Greentree Systems, Inc.

User Manual

iGreentree

Version 8.4



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Greentree believes that learning is most effective when students are entertained as well as informed. Therefore, it is hoped that light-hearted examples, jokes, and cartoons will be accepted in a spirit of fun. Please enjoy learning about and using your iGreentree employment system.



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Version 8.4
Revised May 2010

iGREENTREE QUICK REFERENCE

To Enter a New Applicant:

Use Candidate Self-Service to let people enter themselves
OR Set up the system to collect resumes from email
OR Use Automatic Resume Processing process e-mailed resumes
OR Use Greentree ScanStation to scan and process hard-copy resumes
OR Choose Add Applicants, select a Filing System, select or create Template if needed, enter data, then Save.

To Enter a New Requisition:

Encourage hiring managers to use the Hiring Manager module to enter and track their own Reqs
OR Choose Add Requisition, select or create Template if needed, enter data, then Save.

To Enter a Source or Hiring Manager:

Choose Add Source or Add Hiring Mgr, enter data, then Save.

To Look up One Applicant:

Choose Applicant Find by ID
OR Choose Applicant Find by Name and enter first letter and a few consonant sounds of last name
OR Choose Applicant Find by Name and enter first few letters followed by an asterisk (*)
OR Choose Applicant QuickSearch.

To Search for Several Applicants:

Find a Requisition that you need candidates for, use the Find Matching Apps action
OR Choose Applicant QuickSearch, enter criteria, choose Search.

To Search for Requisitions, Source, Expenses, or Hiring Managers:

Choose the appropriate QuickSearch, enter criteria, choose Search
OR Choose Requisition Find by Req #.

To Send Acknowledgments to Applicants:

If you use several different acknowledgment letters or ways of sending:
Find an Applicant, from Edit or Summary View choose Send Letter Action, select a letter, choose email or hardcopy.
If all Applicants get same acknowledgment letter and all send the same way:
Use QuickSearch to find all Applicants entered Today
Choose Mass Mailing Action, select a letter, choose email or hardcopy.

iGREENTREE QUICK REFERENCE

To Route Applicant Information:

Find the Applicant(s), choose Route Action, enter Recipient(s), select Send By option, select Documents to route.

To Make an Offer:

Find the Applicant, from Edit or Summary View choose Make Offer Action, enter data for offer, select a letter if needed, run action (personalize letter if needed).

To Hire an Applicant:

Find the Applicant, from Edit or Summary View choose Hire Action, enter data for both Applicant and Requisition, select a letter if needed, run action.
OR Find the Requisition, from Edit or Summary View choose Fill Action, enter data for both Applicant and Requisition, select a letter if needed, run action.

To Print Reports:

Choose ReadyReports, highlight a report name, choose Run, enter parameters if prompted
OR Run a QuickSearch, choose Report Action, highlight a report name, choose Run.

To Create a New Letter:

Choose Maintenance, Letters, select an existing letter, choose Edit, copy (Ctrl+C) the text.
Choose View List, choose Add, answer prompts, choose Edit, paste (Ctrl+V) in the text, make changes to text, Save, run appropriate action to test the letter on one Applicant.

To Enter Expenses which Apply to Several Requisitions:

Run a search to find the Requisitions. In List View, choose Expense Distribution.
Enter the full cost; Greentree will divide between selected Reqs.

To Change History Information:

Find the Applicant or Requisition using QuickSearch. Choose the History you want to change.
To enter or change Results of Route, Interview, or App/Req, Comments, Offer Answer or Date:
Pick individual line, pick field, enter data.
To change other History information: Click in left gray column to pick individual line, choose Delete, then use the Action to enter a new history with correct information.

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Introduction and Overview

Introduction

Welcome to the iGreentree Employment System. This manual, in conjunction with training, will help provide new Users with the information needed to use this system effectively.

Objectives

Everyone who plans to use the iGreentree Employment System should go through the Overview. It provides the basic framework for everything that follows. Each User may then determine which of the remaining lesson(s) are appropriate, depending upon their duties within the recruiting department.

After completing the Overview chapter, Users will have a general understanding of the system, be able to move around the system, and perform basic functions. They will be able to:

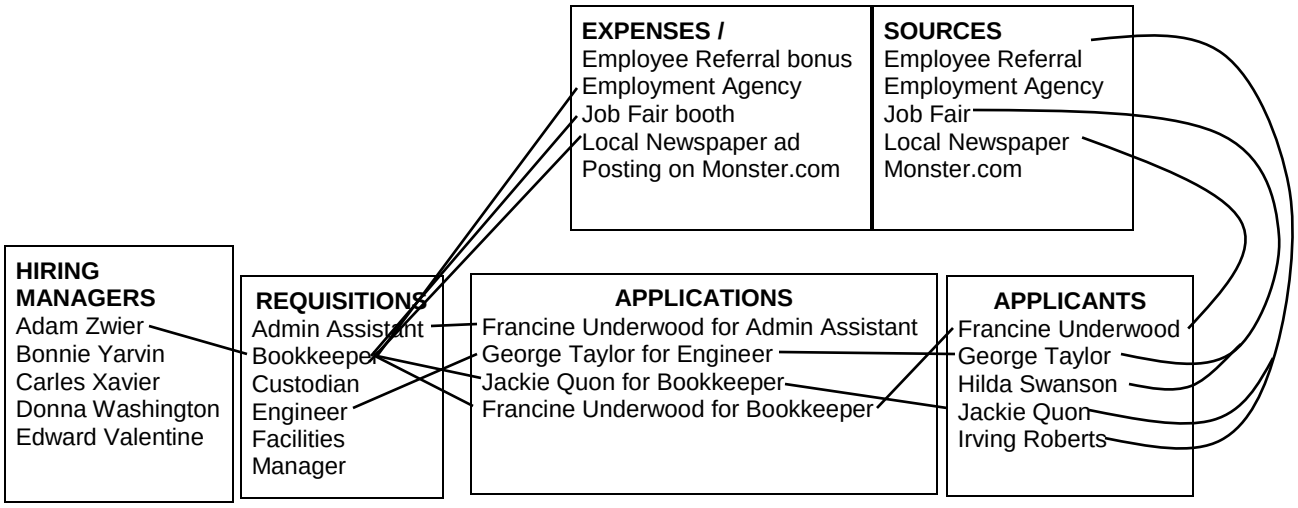
- Familiarize themselves with the capabilities and benefits of the iGreentree system
- Log into the iGreentree system
- Select options from the Menu
- Become familiar with what each of those choices is for
- Exit the system properly

Features of the iGreentree Employment System

Record Applicants Record Applicant activity Route information to managers & others Schedule and record interviews Record testing, reference checking, etc.	Send correspondence to Applicants Send acknowledgement letter, postcards or emails Print labels and/or envelopes Send offer and hire confirmation letters Send regret letters and other letters as needed
Record Requisitions Which are open, which are filled, which are being handled by whom Expenses per opening, per department, etc.	Communicate with Hiring Managers and Sources Route Applicant data and record routings Create Postings, paper and electronic Report on what is overdue from managers
Record Sources and Expenses Post Requisitions to Sources Record which Applicants came from which Sources Record Expenses, report on Cost per Hire	Record History Who applied for what, what were the results What correspondence has been sent What happened with job openings and people
Record Candidates for Requisitions Find Applicants who may be qualified for an opening Log Applicants to Requisitions, keep results per logging	Print reports for recruiters and for management Open Reqs, expenses, cost-per-hire, Req aging, postings, EEO, periodic status reports, Sourcing, graphs & charts, etc.

Major Components of the System

The major components of the system are displayed here with some example data and their relationships:



iGreentree provides the tools to record the relationships and history for all of these components.

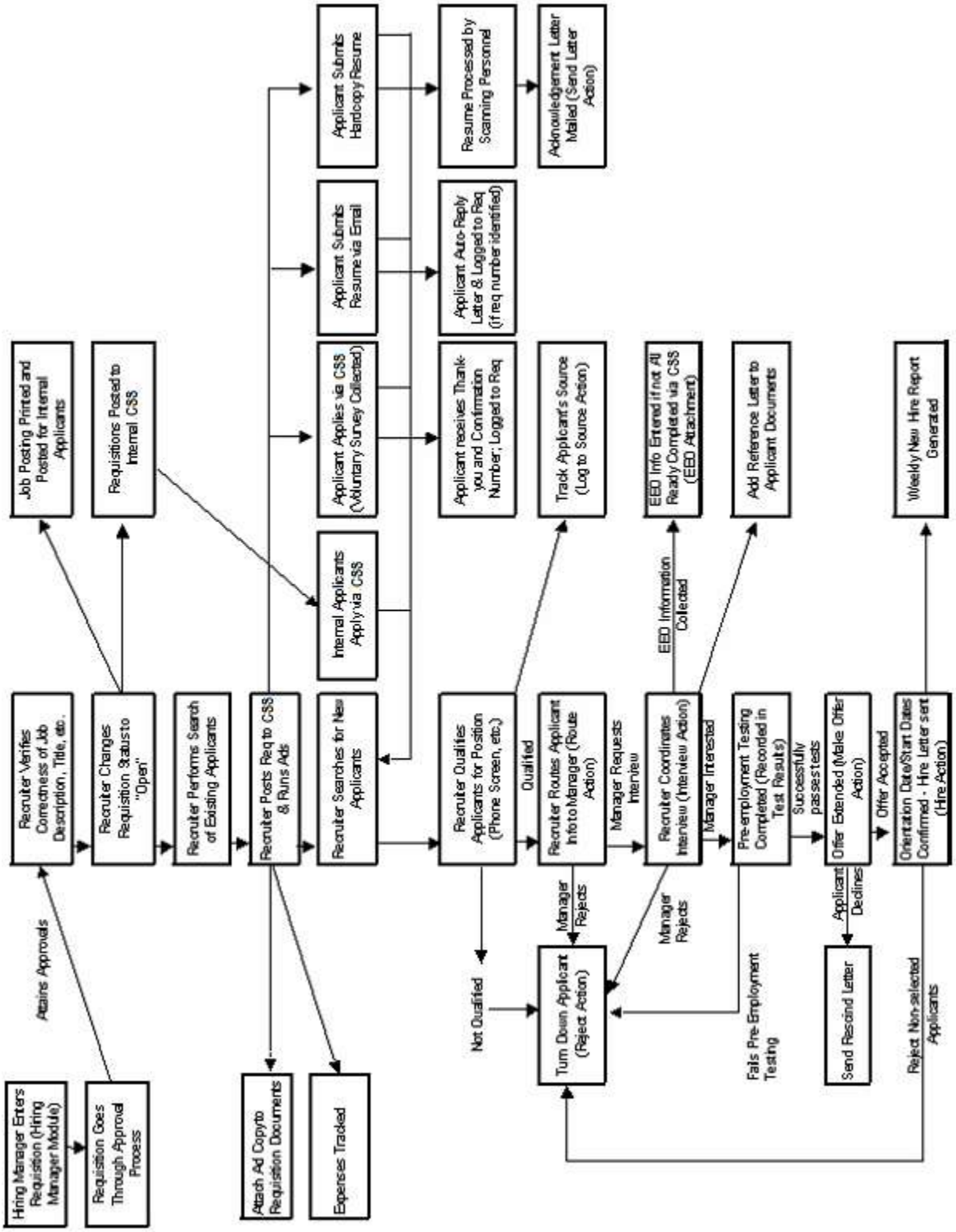
Basic Definitions

iGreentree Term	Definition	Abbreviation
Applicant	Person who applies for a job	App
Application	Information submitted by an Applicant for one specific job opening	Appn
Automatic Resume Processing	The process of automatically bringing resumes from email directly into iGreentree.	ARP
Candidate Self Service	Optional module for letting Applicants apply directly via the internet or intranet	CSS
Expense	Costs associated with the Requisition	Expense
Hiring Manager	Person who initiates a Requisition	Mgr
Multiple Openings Per Requisition	Option that may be needed by organizations who typically get 20+ identical openings at once, not recommended for others	MOPR
Optical Character Recognition	Converting scanned resumes into text for populating data in iGreentree	OCR
Recruitment Department	People responsible for managing the employment and staffing function within an organization	HR
Requisition	Job opening	Req
Result code	The status or disposition of an Applicant relative to a specific job	Result
Resume Processing	Module that allows for ARP, as well as loading resumes that have been scanned and/or manually loading emailed resumes	Res Proc
Source	Where the Applicant found out about the job opening	Source

See the Glossary near the back of the manual for more definitions of terms.

Employment Process Workflow

The iGreentree System closely aligns with the processes that occur in the typical employment department.


Applicant Submits Hardcopy Resume
Resume Processed by Scanning Personnel
Acknowledgement Letter Mailed (Send Letter Action)
Applicant Submits Resume via Email
Applicant Auto-Reply Letter & Logged to Req (if req number identified)
Job Posting Printed and Posted for Internal Applicants
Requisitions Posted to Internal CSS
Applicant Applies via CSS (Voluntary Survey Collected)
Applicant receives Thank-you and Confirmation Number; Logged to Req
Track Applicant's Source (Log to Source Action)
EEO Info Entered if not All Ready Completed via CSS (EEO Attachment)
Add Reference Letter to Applicant Documents
Weekly New Hire Report Generated
Internal Applicants Apply via CSS
Recruiter Verifies Correctness of Job Description, Title, etc.
Recruiter Changes Requisition Status to "Open"
Recruiter Performs Search of Existing Applicants
Recruiter Posts Req to CSS & Runs Ads
Recruiter Searches for New Applicants
Recruiter Qualifies Applicants for Position (Phone Screen, etc.)
Qualified
Recruiter Routes Applicant Info to Manager (Route Action)
Manager Requests Interview
EEO Information Collected
Recruiter Coordinates Interview (Interview Action)
Manager Interested
Pre-employment Testing Completed (Recorded in Test Results)
Successfully passes tests
Offer Extended (Make Offer Action)
Offer Accepted
Orientation Date/Start Dates Confirmed - Hire Letter sent (Hire Action)
Attains Approvals
Hiring Manager Enters Requisition (Hiring Manager Module)
Requisition Goes Through Approval Process
Attach Ad Copy to Requisition Documents
Expenses Tracked
Not Qualified
Manager Rejects
Manager Rejects
Turn Down Applicant (Reject Action)
Fails Pre-Employment Testing
Applicant Declines
Send Rescind Letter
Reject Non-selected Applicants

Human Resources View

Individuals in the Human Resources department can view their recruitment data by using the iGreentree Employment System. This Application has much greater access to data than the other modules. The Hiring Managers and the Applicants have their own modules, described later in this chapter.

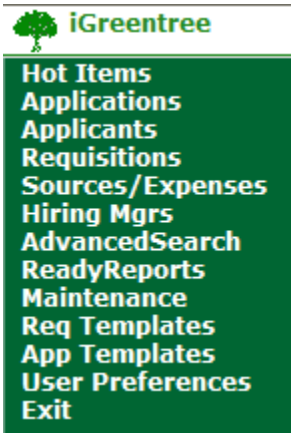
Logging on

From Internet Explorer, enter the iGreentree Employment System URL. The User's password is case sensitive. Successful program execution will display the User Login Window, ready to accept a validated Username and that User's password. Each User should be given a unique Username and password.

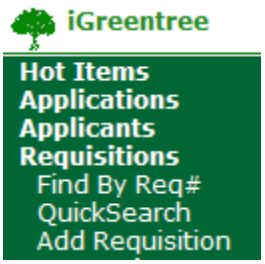


Menus

When first entering the database, the User will see a menu similar to the one displayed below on the left side of the screen:



Each of the main functions has additional options beneath it. The main menu can be expanded to include sub-menus by clicking on the menu option. *Click again to minimize an option.*



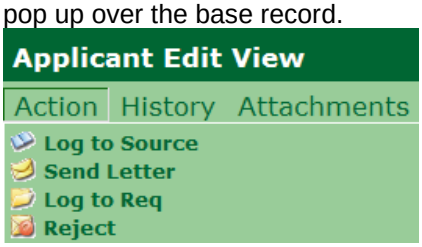
When a sub-menu is selected a new window will open to the right similar to the one shown below.



These windows often consist of

- additional menus located on the top left (*Action, History, Attachments*)
- icon buttons under the menus for often-used menu items
- navigation bar located at the top center
- buttons located on the top right (*List View, Summary, New Search, Save, Close*)
- Greentree Systems Help menu located under the buttons (*Greentree Systems, Inc.*)
- fields containing information located below the icon buttons (*ID, Entered, By*, etc.)

The most common menus are *Action, History,* and *Attachments*. These menus have sub-menus that can be viewed by clicking on the main menu label. Select a sub-menu by moving the mouse down through the list and clicking on the item needed. An additional window will appear at the bottom of the screen or pop up over the base record.



Field Types

A form consists of one or more fields. Each field is defined to contain a certain kind of data based on its field type. There are several types of fields in iGreentree, which may be updated in different ways

Field Type	Definition	How to update	Example
Coded	Has a limited list of choices, to keep data consistent and easy to enter/search. Codes can be added to the list from Maintenance.	Click on the arrow, choose from the list, and click *OK.* To clear, choose *None.*	
Coded with AutoFill	Has a lookup table behind the code, with fields that fill in automatically as defaults on the main screen. Lookup table values can be modified in Maintenance.	Click on the arrow, choose from the list, and click *OK.* Other fields will default, but can be over-ridden.	
Date	Dates are displayed in MM/DD/YYYY format for easy entry and searching	Click on the calendar button, pick a date, and click *OK.* To clear, highlight and press *Delete* key on keyboard.	
Text	Simple text fields let the User type any characters.	Just type in the needed text. Try to be consistent with case and abbreviations. To clear, highlight and *Delete*.	
Number or Amount	Numbers or dollar amounts are formatted for easy range searching. These look like text fields, but do not allow the entry of alpha characters.	Don't bother keying $ or comma. If round number, don't bother keying .00. To clear, highlight and *Delete.*	

Buttons

Most windows have buttons in the top right corner, allowing the User to choose functions as needed.



Buttons require a single click. Sometimes when a button is highlighted as the default, the User can simply press the *Enter* key on the keyboard to choose that function.

Resizing Windows

Many of the windows may be resized, such as lists of History, to display information to the User's preference. Just put the cursor on the edge of a window, and use the double-headed arrow to drag to the size desired.

The menu bar on the left can also be resized, making the window being viewed larger or smaller as needed.

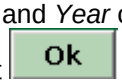
Navigation Box

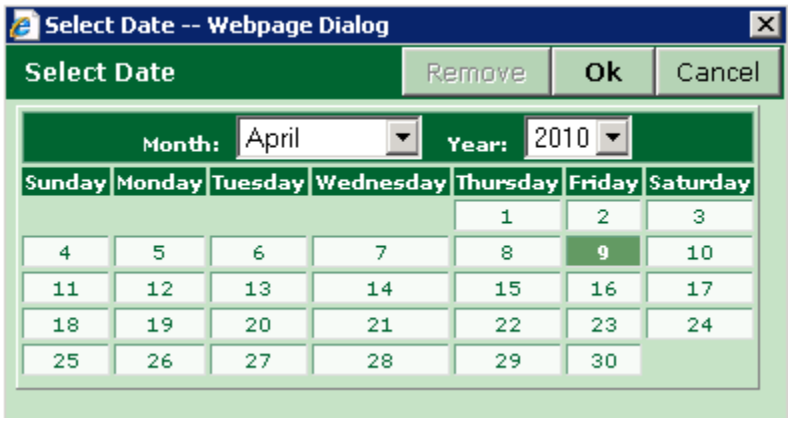
The navigation box allows the User to switch between records. 

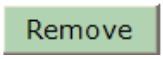
The far-left arrow will move to the very first record found in a search. The single arrow on the left will move to the previous record. The single arrow on the right will move to the next record in the list. And the last arrow on the right will move to the very last record.

Calendar

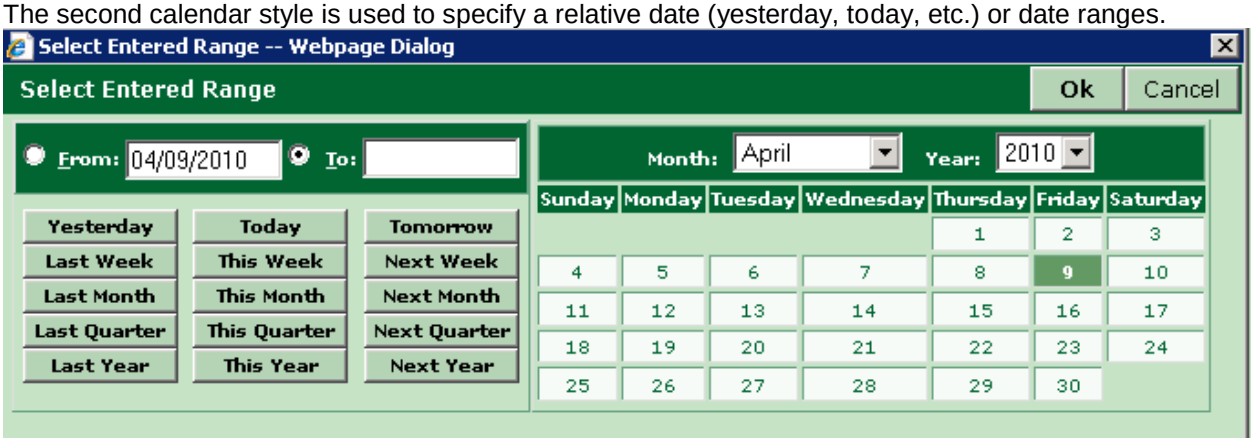
To view the calendar click on the  button next to any date field. There are two different calendar styles that can appear.

One calendar style is used for selecting an individual date such as a start date. To select a specific date, choose from the *Month* and *Year* coded lists and then click on the specific *Day* within the displayed calendar month. Select  to continue and populate the chosen date onto the date field.

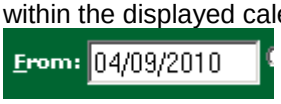


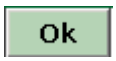
To clear this kind of calendar field, click on the  button next to the date field and then click on the  button.

The second calendar style is used to specify a relative date (yesterday, today, etc.) or date ranges.


Select Entered Range -- Webpage Dialog
Select Entered Range
Ok
Cancel
From: 04/09/2010
To:
Yesterday Today Tomorrow
Last Week This Week Next Week
Last Month This Month Next Month
Last Quarter This Quarter Next Quarter
Last Year This Year Next Year
Month: April
Year: 2010
Sunday Monday Tuesday Wednesday Thursday Friday Saturday
1 2 3
4 5 6 7 8 9 10
11 12 13 14 15 16 17
18 19 20 21 22 23 24
25 26 27 28 29 30

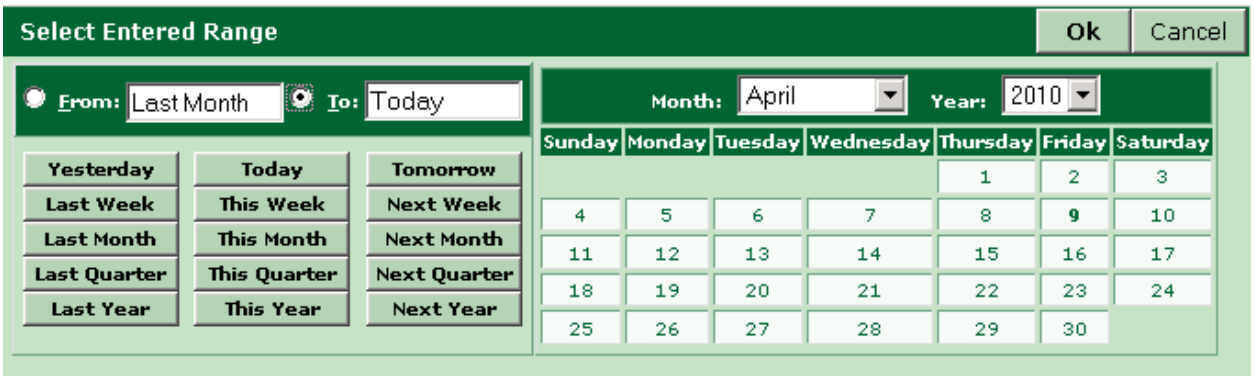
To select a specific date, choose from the *Month* and *Year* coded lists and then click on the specific *Day* within the displayed calendar month. When a specific date is selected it will appear in the *From* box.

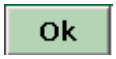


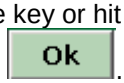
Select  to continue and populate the chosen date onto the date field.

To select a date range, click the appropriate relative date button, such as *Last Month* or choose a specific *Month*, *Year*, and *Day* and it will populate the *From* box. As soon as a *From* date is selected, the *To* box will become active. 

Next choose a specific *Month*, *Year*, and *Day* or you may select another relative date, if appropriate (such as *Today)* and populate the *To* box.

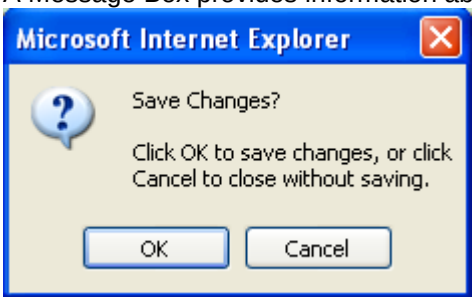


Now choose  to populate the range onto the date field. 

To clear a date range, click on the  button to retrieve the calendar range. Highlight the date in the *From* box and hit the Delete key or hit the Backspace key until the field is empty. Repeat this for the date in the *To* box. Now choose  .

Message Box

A Message Box provides information about a system process or a User action.



The User should always read the message! If it is clear what to do, click on *OK*. If the message includes the word *error* or any other cryptic message, the User should inform his/her iGreentree Administrator immediately, BEFORE clicking on *OK*. It is usually helpful to know what the User was doing prior to the error message.

Getting Help

Within almost every window, the User can click on the Greentree Systems, Inc. menu near the top right. The menu includes a list of choices for help, including a link to the Greentree web site and ways to contact Greentree via email.



Status Bar Help

As the User moves the mouse cursor around the screen, the gray status bar at the bottom of the screen will change to describe the action currently being performed. If there is a delay while the system is working on something, this Status Bar will give a clue as to what it is doing.

Tool Tips
When the User moves the mouse cursor over a button or a field, a yellow *Tool Tip* displays the name of that button.



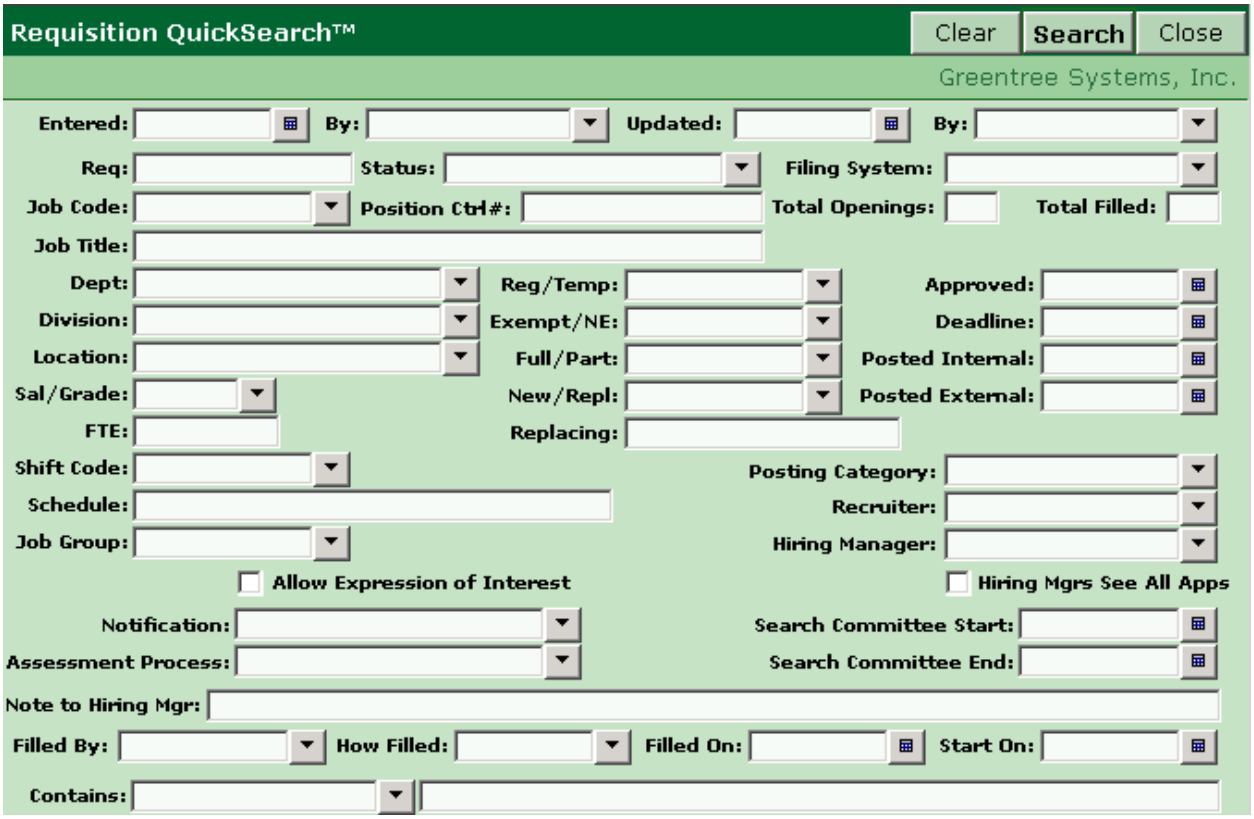
Other Help
- Read iGreentree's User Manual
- Reference internal company documentation of how to use iGreentree
- Ask the designated iGreentree Administrator and other co-workers
- You or the designated iGreentree Administrator can call the IT department
- The iGreentree Administrator can call Greentree (408-879-1410 or 800-348-8845)
- Get extra training from Greentree (call above numbers to schedule)
- Visit Greentree's web site: http://www.GreentreeSystems.com
- Send email to Support@GreentreeSystems.com

Introduction to Searching
Users can search for almost any data in the system. Searches can be run for Applications, Applicants, Requisitions, Sources/Expenses, Hiring Managers, and Templates.

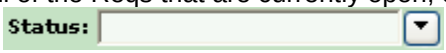
Searching for Requisition Data

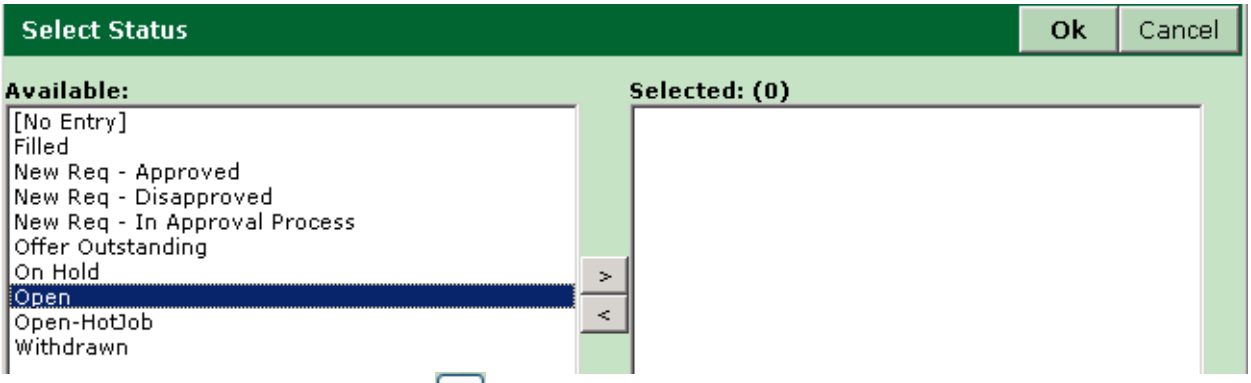
Select *Requisitions*, then *QuickSearch.*





To find all of the Reqs that are currently open, click on the arrow for the *Status* field (near the top middle).





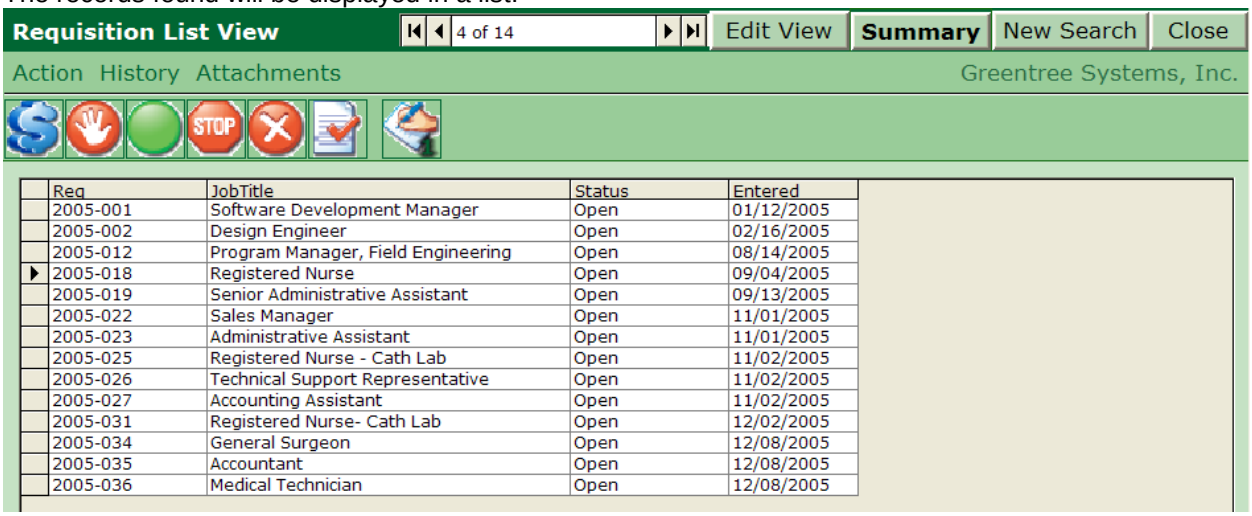
Select *Open*, click on the right arrow > to move the *Open* status to the *Selected* list then click on the Ok button to return to the QuickSearch window.

When selecting codes, the User can highlight the selected code then use the > button to move the selected code to the selected list. For faster selection the User can also double-click the selected code to automatically move it to the selected list. The User may also select [No Entry] to find all records that are null.

Click on the Search button to run the search.

List View

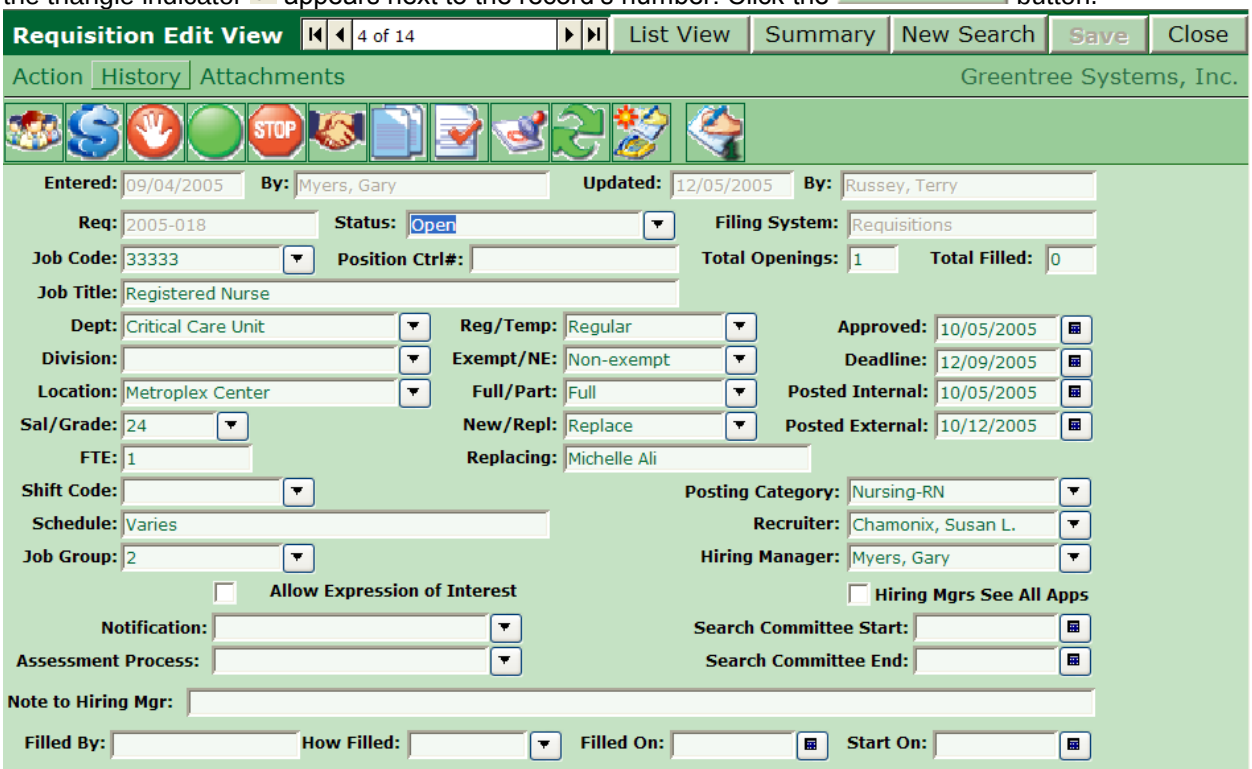
The records found will be displayed in a list.



Req	JobTitle	Status	Entered
2005-001	Software Development Manager	Open	01/12/2005
2005-002	Design Engineer	Open	02/16/2005
2005-012	Program Manager, Field Engineering	Open	08/14/2005
2005-018	Registered Nurse	Open	09/04/2005
2005-019	Senior Administrative Assistant	Open	09/13/2005
2005-022	Sales Manager	Open	11/01/2005
2005-023	Administrative Assistant	Open	11/01/2005
2005-025	Registered Nurse - Cath Lab	Open	11/02/2005
2005-026	Technical Support Representative	Open	11/02/2005
2005-027	Accounting Assistant	Open	11/02/2005
2005-031	Registered Nurse- Cath Lab	Open	12/02/2005
2005-034	General Surgeon	Open	12/08/2005
2005-035	Accountant	Open	12/08/2005
2005-036	Medical Technician	Open	12/08/2005

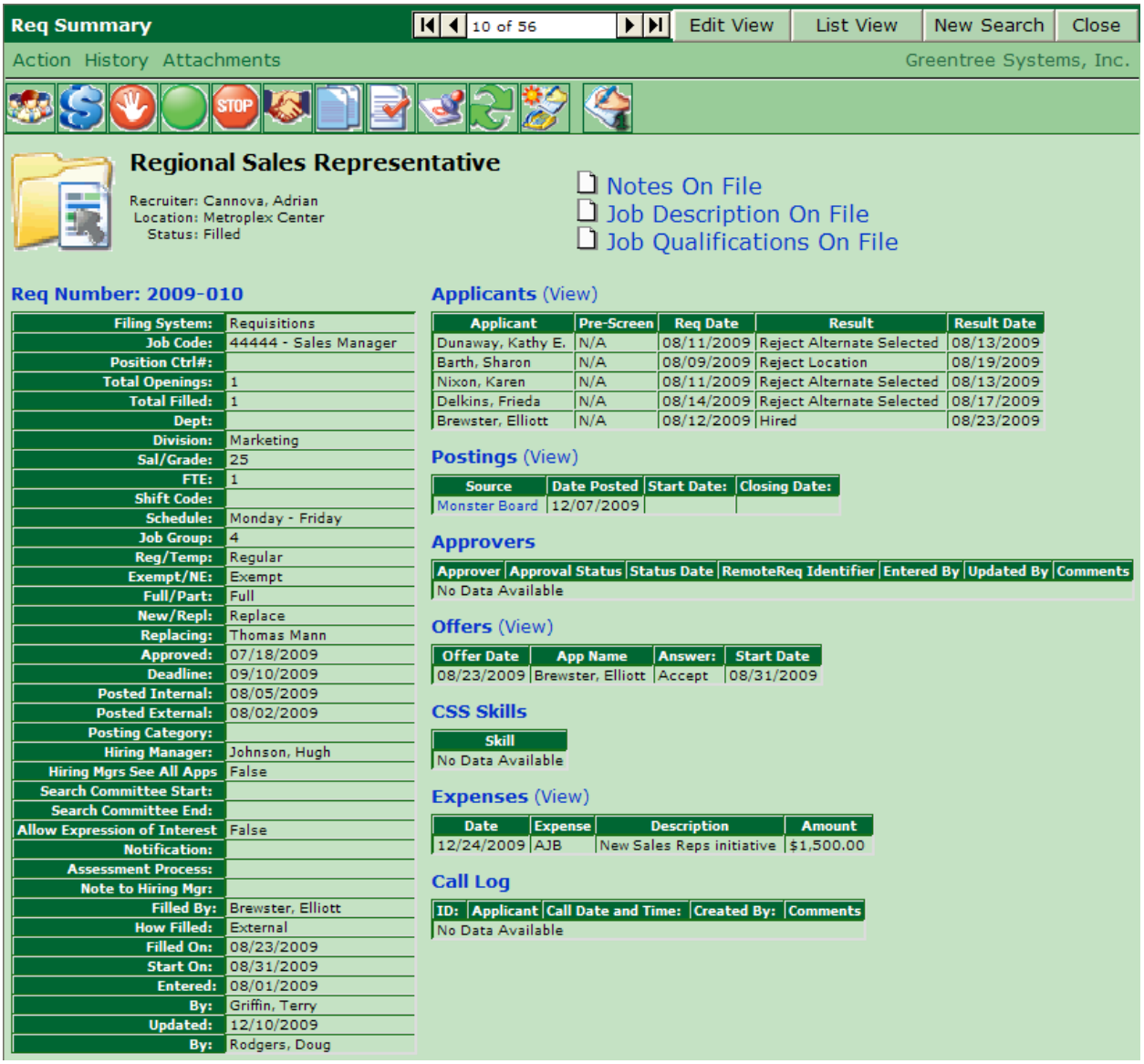
Edit View

To display more information about a single record, select the record by clicking on the record line so that the triangle indicator ▶ appears next to the record's number. Click the Edit View button.



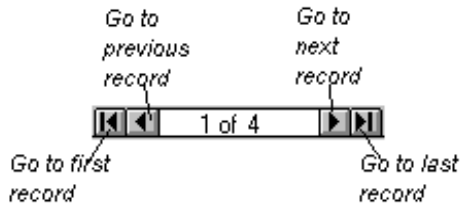
Summary View

To display an overview of the Requisition that shows the current Applicants and their qualifications, the approver status, etc. click on the Summary button.


Req Summary
10 of 56
Edit View
List View
New Search
Close
Action History Attachments
Greentree Systems, Inc.
Regional Sales Representative
Recruiter: Cannova, Adrian
Location: Metroplex Center
Status: Filled
Notes On File
Job Description On File
Job Qualifications On File
Req Number: 2009-010
Filing System: Requisitions
Job Code: 44444 - Sales Manager
Position Ctrl#:
Total Openings: 1
Total Filled: 1
Dept:
Division: Marketing
Sal/Grade: 25
FTE: 1
Shift Code:
Schedule: Monday - Friday
Job Group: 4
Reg/Temp: Regular
Exempt/NE: Exempt
Full/Part: Full
New/Repl: Replace
Replacing: Thomas Mann
Approved: 07/18/2009
Deadline: 09/10/2009
Posted Internal: 08/05/2009
Posted External: 08/02/2009
Posting Category:
Hiring Manager: Johnson, Hugh
Hiring Mgrs See All Apps: False
Search Committee Start:
Search Committee End:
Allow Expression of Interest: False
Notification:
Assessment Process:
Note to Hiring Mgr:
Filled By: Brewster, Elliott
How Filled: External
Filled On: 08/23/2009
Start On: 08/31/2009
Entered: 08/01/2009
By: Griffin, Terry
Updated: 12/10/2009
By: Rodgers, Doug
Applicants (View)
Applicant | Pre-Screen | Req Date | Result | Result Date
Dunaway, Kathy E. | N/A | 08/11/2009 | Reject Alternate Selected | 08/13/2009
Barth, Sharon | N/A | 08/09/2009 | Reject Location | 08/19/2009
Nixon, Karen | N/A | 08/11/2009 | Reject Alternate Selected | 08/13/2009
Delkins, Frieda | N/A | 08/14/2009 | Reject Alternate Selected | 08/17/2009
Brewster, Elliott | N/A | 08/12/2009 | Hired | 08/23/2009
Postings (View)
Source | Date Posted | Start Date: | Closing Date:
Monster Board | 12/07/2009
Approvers
Approver | Approval Status | Status Date | RemoteReq Identifier | Entered By | Updated By | Comments
No Data Available
Offers (View)
Offer Date | App Name | Answer: | Start Date
08/23/2009 | Brewster, Elliott | Accept | 08/31/2009
CSS Skills
Skill
No Data Available
Expenses (View)
Date | Expense | Description | Amount
12/24/2009 | AJB | New Sales Reps initiative | $1,500.00
Call Log
ID: | Applicant | Call Date and Time: | Created By: | Comments
No Data Available

Moving to Another Record

To move to another Applicant record, use the *Navigation Box.*



Changing Data

To change data simply enter new data in the appropriate field(s), then choose the Save button. (See "Field Types" on page 6 for ways to enter data.) If the User forgets to save, he/she will be prompted when they close the record or select a different function.

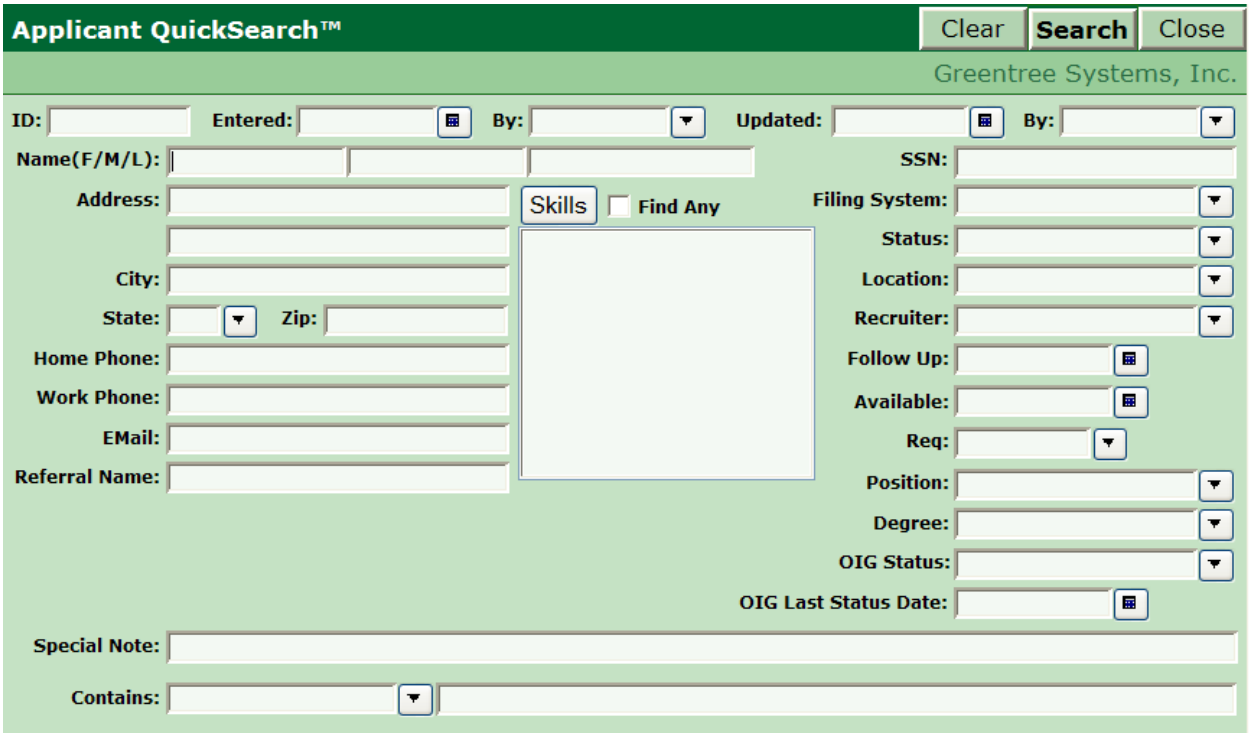


The Updated and By fields at the top are automatically updated to record the last date and person who updated the record.

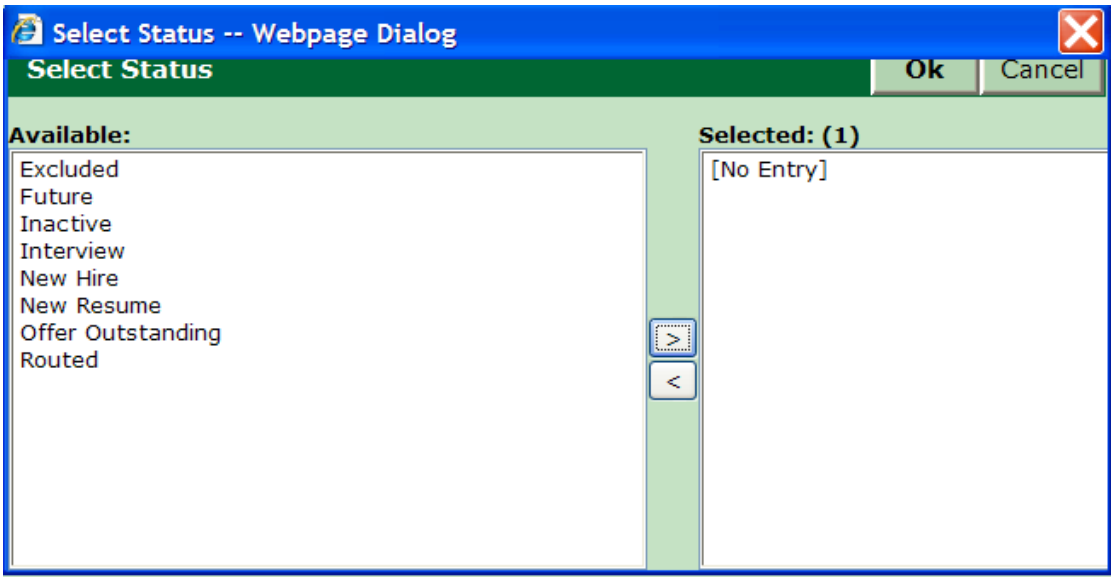
Searching for Applicant Data

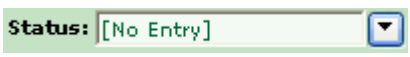
Select Applicants, then *QuickSearch*.





To find all of the Applicants that do not have a *Status* assigned to their record, click on the arrow next to *Status* field (on the right side of the Applicant window). Move *[No Entry]* to the Selected column, *t*hen click on *OK* to return to the QuickSearch window.





Click on the 

button to run the search.

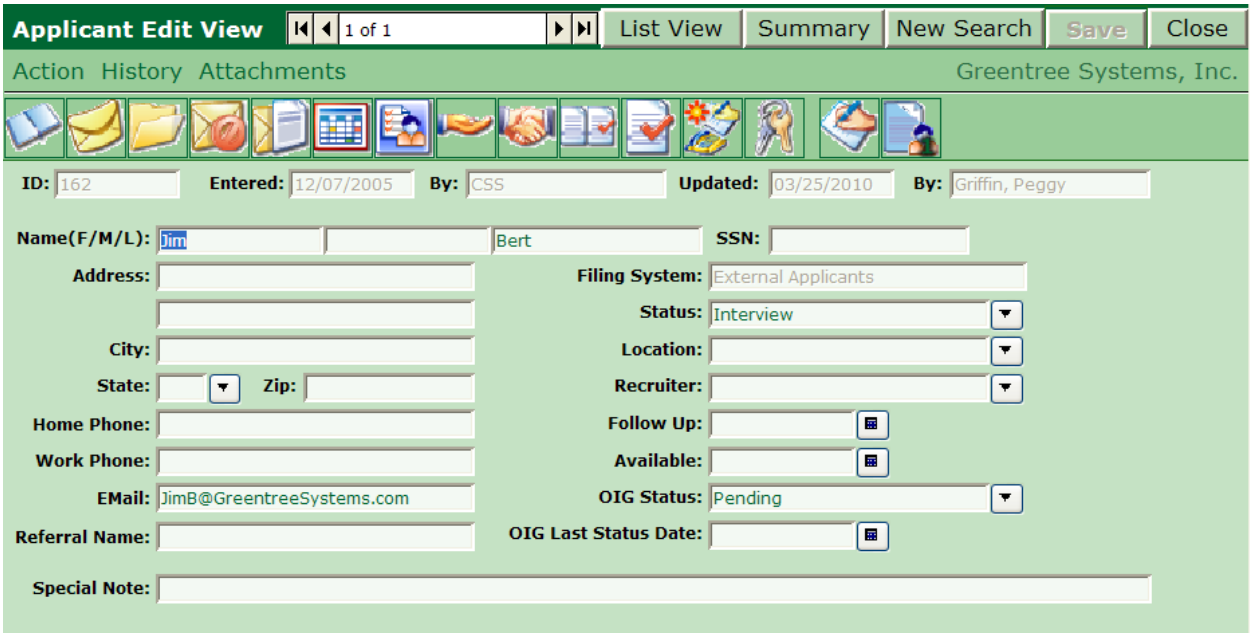
List View

The records that fit the criteria will be displayed. If more than one record is found the results will display in the List View:

	ID	Name	Status	Recruiter Name	Entered
▶	162	Bert, Jim			03/02/2005
	159	Cone, Bonnie			02/28/2005
	163	Griffin, Terry			12/13/2005
	500008	Hohulin, John			02/23/2005
	140	Radish, Jennifer			01/25/2005
	141	Watson, Eddie			01/26/2005

Edit View

Use the Edit View button to display more information about the first record.



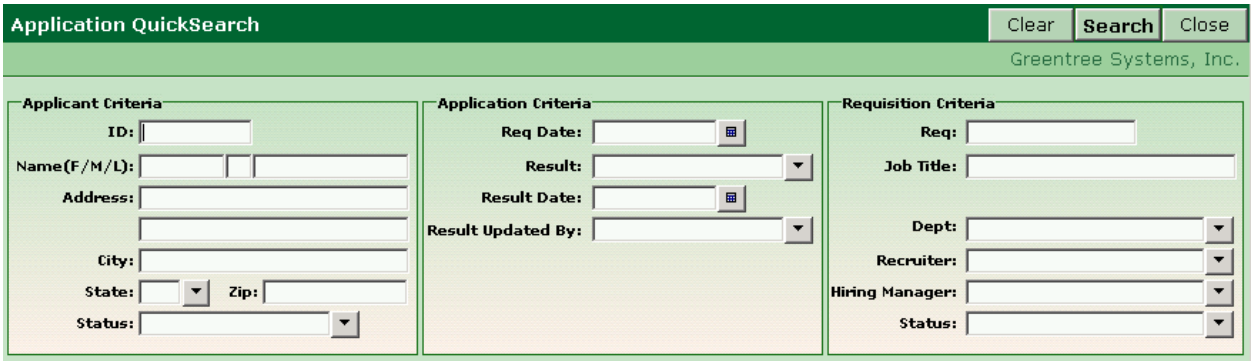
Summary View

To display an overview of the Applicant that shows the Applications they have submitted (Reqs Applied For), a summary of their personal information and qualifications, etc. click on the Summary button.

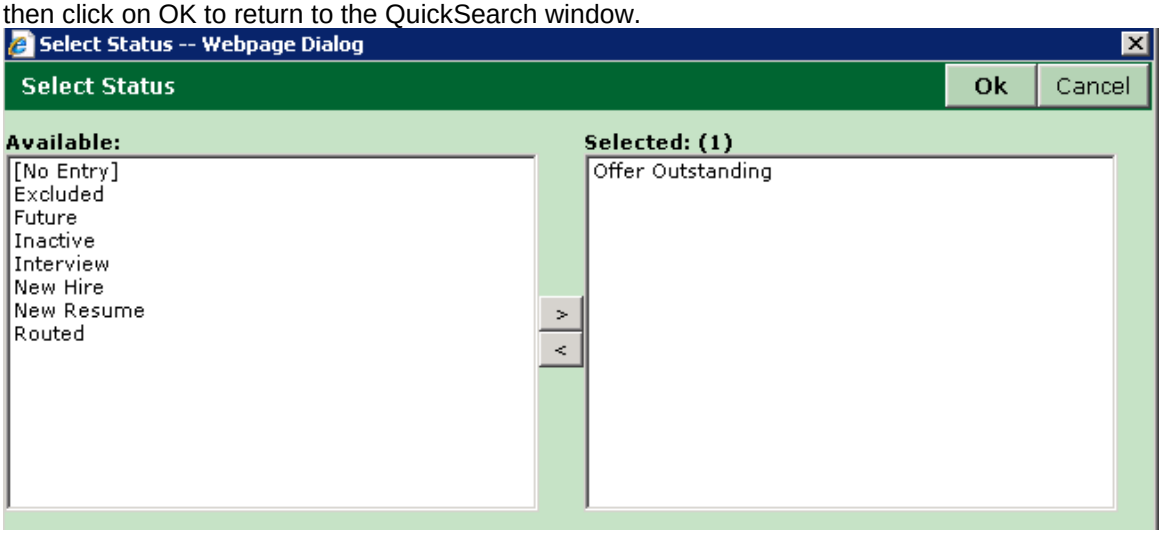


Searching for Application Data

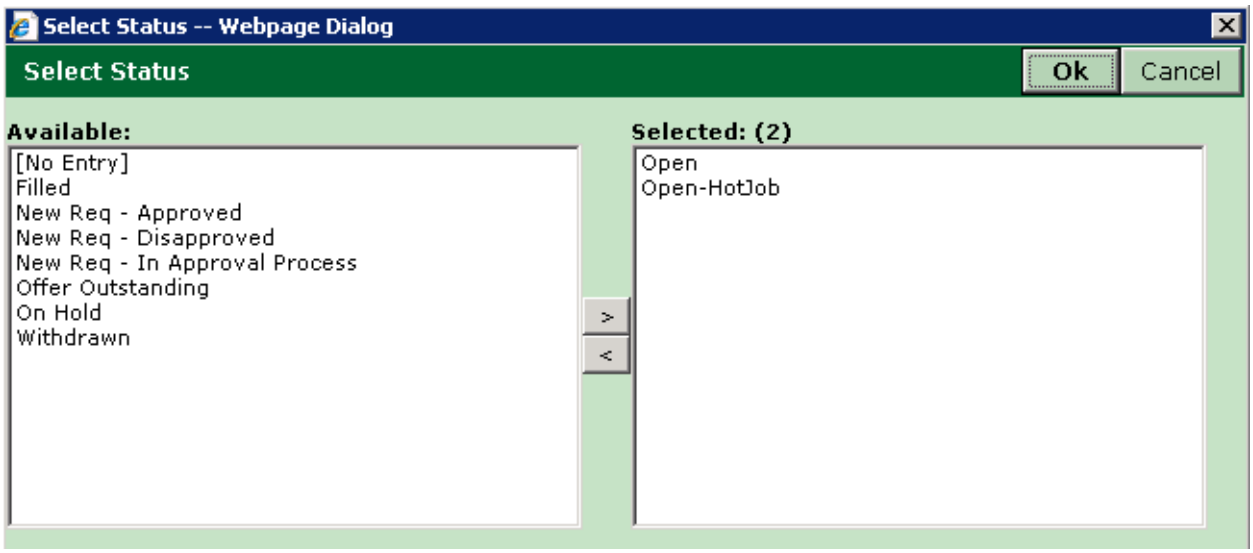
Select Applications, then *QuickSearch*. 

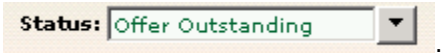


To find all of the Applications that have an offer outstanding for an open Requisition, under *Applicant Criteria* click on the arrow  next to the *Status* field. Move *Offer Outstanding* to the Selected column, then click on OK to return to the QuickSearch window.



Now, under *Requisition Criteria* click on the arrow  next to the *Status* field. Move Open and Open-*HotJob* to the Selected column, then click on OK to return to the QuickSearch window.

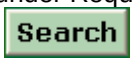


The Status under Applicant Criteria will be 

.

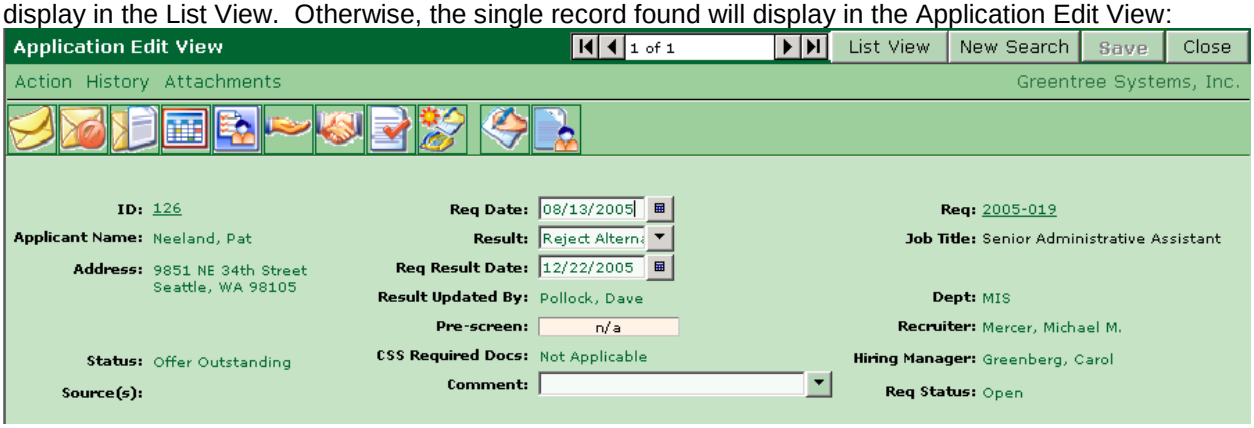
The Status under Requisition Criteria will be 

.

Click on the 

button to run the search.

The records that fit all the criteria will be displayed. If more than one record is found the results will display in the List View. Otherwise, the single record found will display in the Application Edit View:

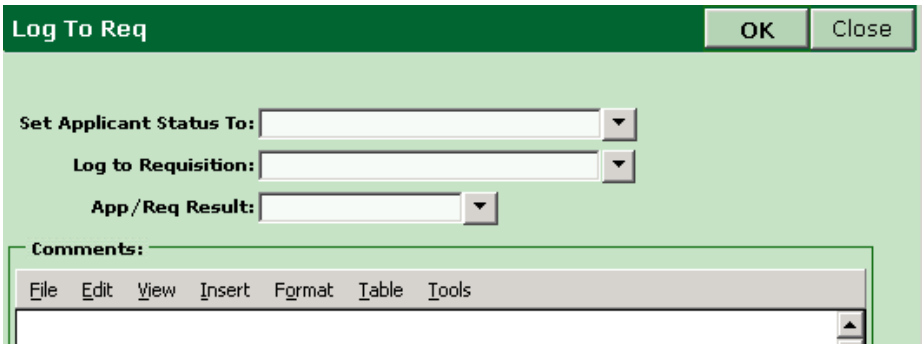


Introduction to Actions

Actions are used for the various events that happen in the employment process, to update information and provide any necessary output, such as letters or reports.

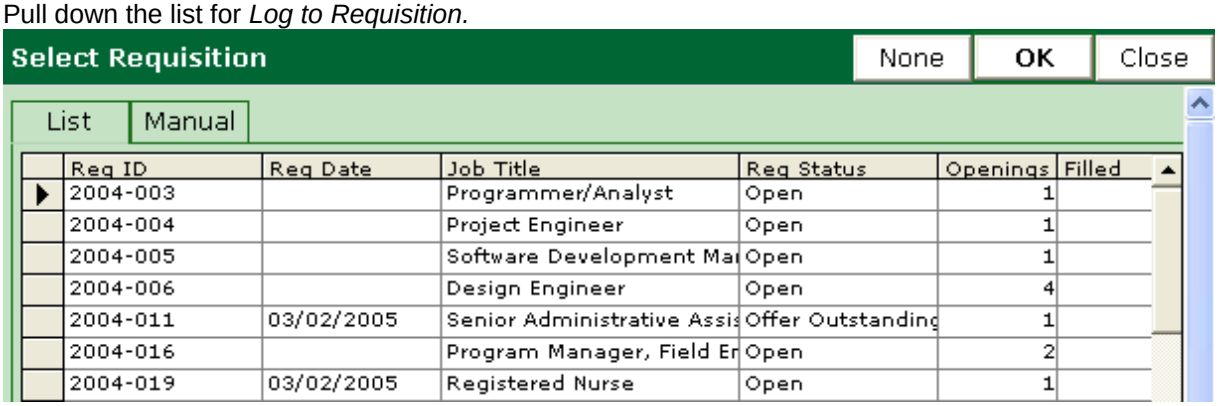
At whatever stage in the process an Applicant becomes a Candidate for a particular opening, the User can log them to the Requisition. Select *Log to Req* from the Action Menu.

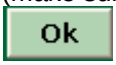


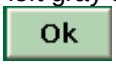


The *Set Applicant Status To* field, if populated, will update the Status field on the Applicant's main record. Often times the Applicant may already have the appropriate Status so this field will be left blank. If a new Status is selected, it will overwrite the old Status upon execution of the Action. The *App/Req Result* field, if populated, will update the App/Req Result field (on both the Applicant side and the Requisition side) for the selected Requisition.

Pull down the list for *Log to Requisition.*


Select Requisition
None
OK
Close
List
Manual
Req ID | Req Date | Job Title | Req Status | Openings | Filled
2004-003 | | Programmer/Analyst | Open | 1 |
2004-004 | | Project Engineer | Open | 1 |
2004-005 | | Software Development Ma | Open | 1 |
2004-006 | | Design Engineer | Open | 4 |
2004-011 | 03/02/2005 | Senior Administrative Assis | Offer Outstanding | 1 |
2004-016 | | Program Manager, Field Er | Open | 2 |
2004-019 | 03/02/2005 | Registered Nurse | Open | 1 |

Select the Requisition (make sure the selection arrow in the left gray column is pointing at the record to be selected). Choose 

to select the Req. Choose 

to run the Action.

For our most popular actions you may also run the action by selecting the corresponding picture located above the Applicant record (in Edit View only).

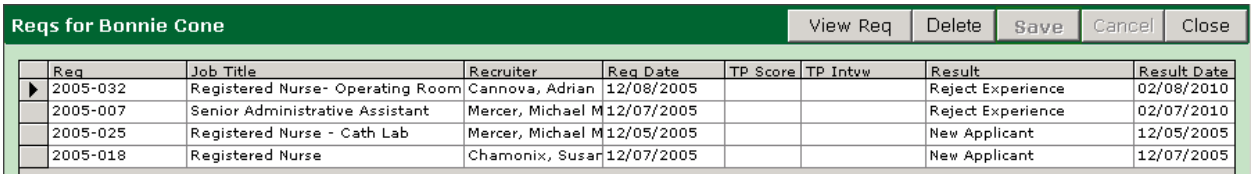


For *Log to Requisition* action you would select the  button and the Log to Req Action dialog box would appear, follow all other steps as normal.

Introduction to History

Select *Reqs Applied For* from the *History* menu. NOTE: The total number of Requisitions applied for is displayed here.





Req	Job Title	Recruiter	Req Date	TP Score	TP Intvw	Result	Result Date
2005-032	Registered Nurse- Operating Room	Cannova, Adrian	12/08/2005			Reject Experience	02/08/2010
2005-007	Senior Administrative Assistant	Mercer, Michael M	12/07/2005			Reject Experience	02/07/2010
2005-025	Registered Nurse - Cath Lab	Mercer, Michael M	12/05/2005			New Applicant	12/05/2005
2005-018	Registered Nurse	Chamonix, Susar	12/07/2005			New Applicant	12/07/2005

A list of all the Reqs that this Applicant has ever been logged to displays at the bottom of the window. There is a *View Req* button available to see more information about each Req. This button will open another window over the Applicant's base record and display the selected Requisition.

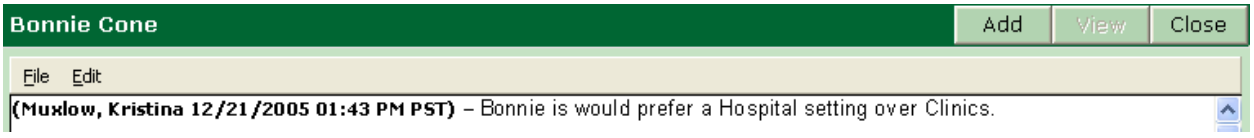
The User can examine some of the other History items while here or close the window to return to the Applicant's record.

Introduction to Attachments

Click on *Attachments* in the menu bar to see a list of all the different types of Attachments for Applicants.



Choose *Notes* from this list.



Notes can be used to record miscellaneous information about a person, rather than scribbling on resumes, Applications, or sticky notes.

If any existing Notes are available for this Applicant they will be displayed at the bottom of the screen.

Introduction to Resume Processing

The Resume Processing module allows resumes to be brought into the iGreentree system by either loading resumes that came from email, or scanning hardcopy resumes with *ScanStation.*

Scanned Resumes

Start a new Applicant search to find an Applicant *that was entered by either e-mail or* ScanStation.

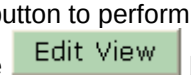
Select Applicants, then *QuickSearch*.



In the *By* section (next to Entered, NOT updated) use the coded list to select ARP.

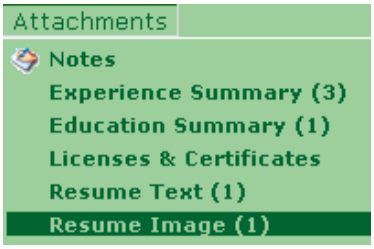


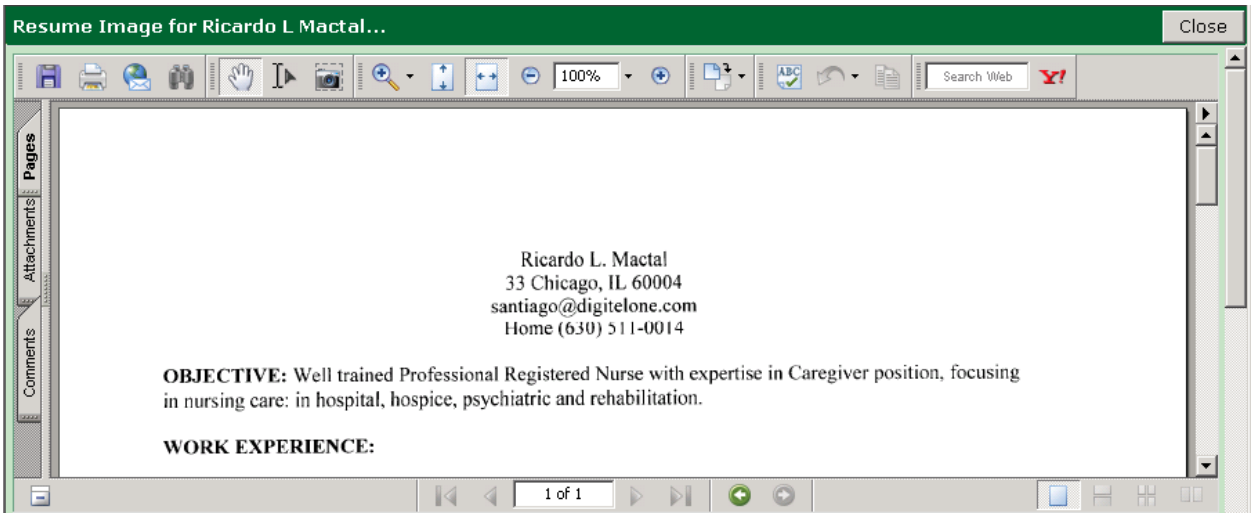
Click the 

button to perform the search. The results will be displayed in *List View*, highlight one Applicant and use the 

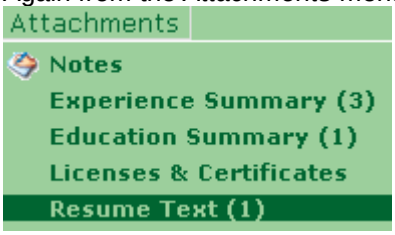
button to review the specific Applicant.

Under the *Attachments* menu, select *Resume Image. Images are displayed using Adobe Acrobat. If this software is not installed on the computer the image will not be able to be displayed.*





Again from the *Attachments* menu, select *Resume Text*.



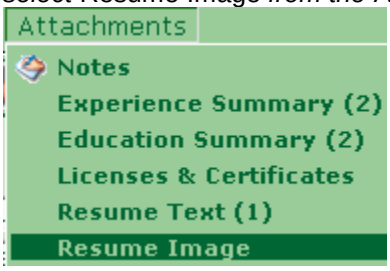

Resume Text for Ricardo L Mactal...
Save
Cancel
Close
File Edit View Insert Format Table Tools
Ricardo L. Mactal
33 Chicago, IL 60004
santiago@digitelone.com
Home (630)511-0014
OBJECTIVE: Well trained Professional Registered Nurse with expertise in Caregiver position, focusing in nursing care: in hospital, hospice, psychiatric and rehabilitation.
WORK EXPERIENCE:
Wilson Hospital — Darian, IL
Emergency Room RN 10/2000- 10/2001
Trained with emergency response team. Facilitated the access, treatment, and transfer/release phases for assigned patients. Maintained patient records consistent with hospital guidelines. Assisted in Public

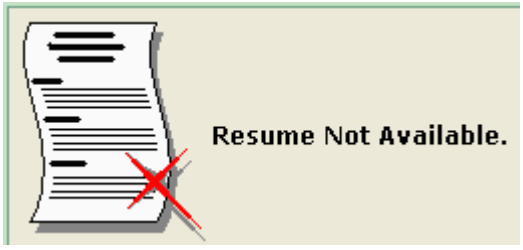
This document is a simple text file that would have been entered one of three ways. First, an Applicant may have pasted a text copy of his/her resume into their online Application. Second, they may have emailed a resume into an inbox that is processed into the system. Third, the resume text may be the result of a scanned resume that went through Optical Character Recognition (OCR).

Resume Text can be searched. However, resumes that went through OCR may not be perfect, due to OCR errors.

Emailed Resumes

For resumes that come originally via email, there is no Resume Image Attachment*. If a User were to select* Resume Image *from the* Attachment *menu the following message will display.*





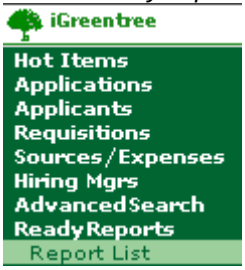
There will however be a copy of the Resume stored under *Resume Text.* To access this data follow the same procedure above, under the *Attachments* menu, select *Resume Text.*

To see Automatic Resume Processing in action, send a resume (either in the body of an email or a .TXT, .DOC, .RTF, or HTML attachment) to a live resume inbox. See Maintenance/Resume Inboxes for information about how to set these up.

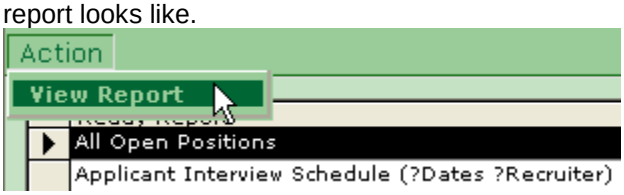
Introduction to Reporting

There are two ways to run reports in the iGreentree database. Reports may be run after conducting a search thus including only those records found from the search. Reports may also be run from ReadyReports and include search criteria within the report definition.

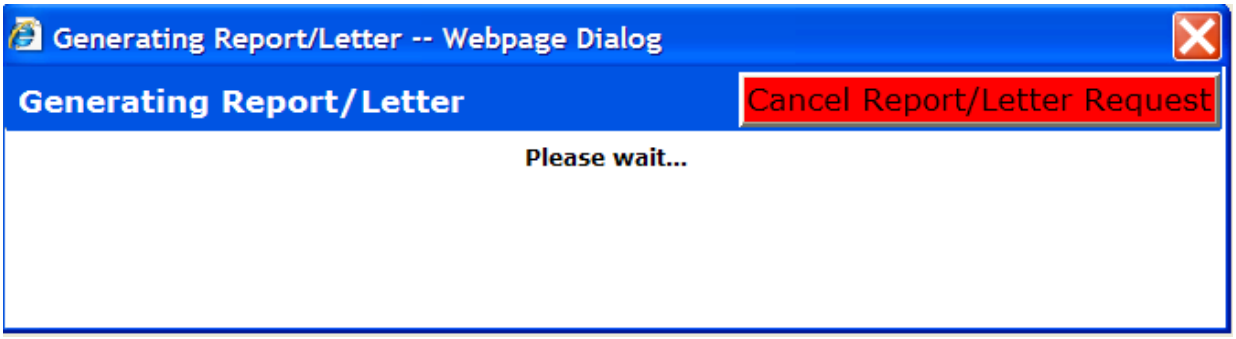
Select *ReadyReports* from the main menu, then choose *Report List.*



While highlighting the *All Open Positions* report, select *View Report* from the *Action* menu to see what this report looks like.



When prompted for a report format, select your desired Output Format (PDF or Crystal Reports will display the best) and click the Run button. It may take a minute for the *system to build the report.*



All Open Positions

Showing Days Open Based on Requisition Date Received

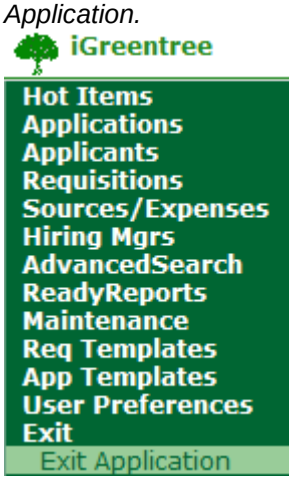
Req. No.	Position	Department	New/ Replace	Replacing	Grade	Recruiter	Received	Days Open
2004-003	Programmer/Analyst	MIS	Replace	Kathy Billingham	25	Katherine Knox	02/05/04	685
2004-004	Project Engineer	Engineering	New		23	Michael Mercer	02/04/04	686
2004-005	Software Development Manager	MIS	New		25	Katherine Knox	04/06/04	624
2004-006	Design Engineer	Engineering	New		24	Michael Mercer	05/07/04	593
2004-011	Senior Administrative Assistant	Accounting	Replace	Mary Solomon	16	Michael Mercer	09/07/04	470
2004-013	Sales Support Assistant	Surgical Services	Replace	Tom Wicker	15	Adrian Cannova	10/01/04	446
2004-016	Program Manager, Field Engineering	Engineering	New		23	Michael Mercer	11/04/04	412
2004-019	Registered Nurse	Critical Care Unit	Replace	Michelle Ali	24	Susan Chamonix	11/28/04	388
2004-020	Senior Administrative Assistant	MIS	New		16	Michael Mercer	12/05/04	381
2005-005	Sales Manager	Surgical Services	New		24	Adrian Cannova	01/24/05	331
2005-006	Administrative Assistant	Surgical Services	New		16	Michael Mercer	01/24/05	331
2005-007	Administrative Assistant	Surgical Services	New		16	Michael Mercer	01/24/05	331
2005-008	Registered Nurse	Critical Care Unit	New		22	Michael Mercer	01/14/05	341
2005-012	Technical Support Representative	MIS	New		25	Katherine Knox	01/25/05	330
2005-013	Accounting Assistant	Accounting	New		16	Susan Chamonix	01/26/05	329
2005-016	General Surgeon	Hospice	New		24	Katherine Knox		0
2005-018	Accountant	Accounting	New		15	Adrian Cannova		0
2005-019	Medical Technician	Patient Care Unit	Replace	Tammy Elliott	22	Susan Chamonix		0
2005-020	HR Generalist	Human Resources	New		24	Adrian Cannova		0
2005-042	Registered Nurse- Cath Lab	Hospice			15	Adrian Cannova		0
2005-050	Registered Nurse- Operating Room	Critical Care Unit			15	Adrian Cannova		0
2005-051	A future Position Nurse position (may not be currently available)					Katherine Knox		0
2005-054	General Surgeon	Hospice	Replace		24			0

ReadyReport: All Open Positions printed on 12/21/2005 *Page 1*

An additional browser window opened to display the report, close it when you are finished viewing.

Exiting the Database

To exit the iGreentree Employment System, select the *Exit* button from the Main Menu, then choose *Exit Application.*



Exiting improperly may possibly prevent another User from logging in. When a User logs out improperly they are still logged into the server and are holding a User seat. When a system reaches the licensed

maximum number of concurrent Users it will not allow more Users to log in. The iGreentree Administrator has access to manually log Users off the system.

Hiring Manager's View

The *Hiring Manager* module enables managers to enter and record their own Requisitions. In addition, they can review Applicants that have been approved by HR.

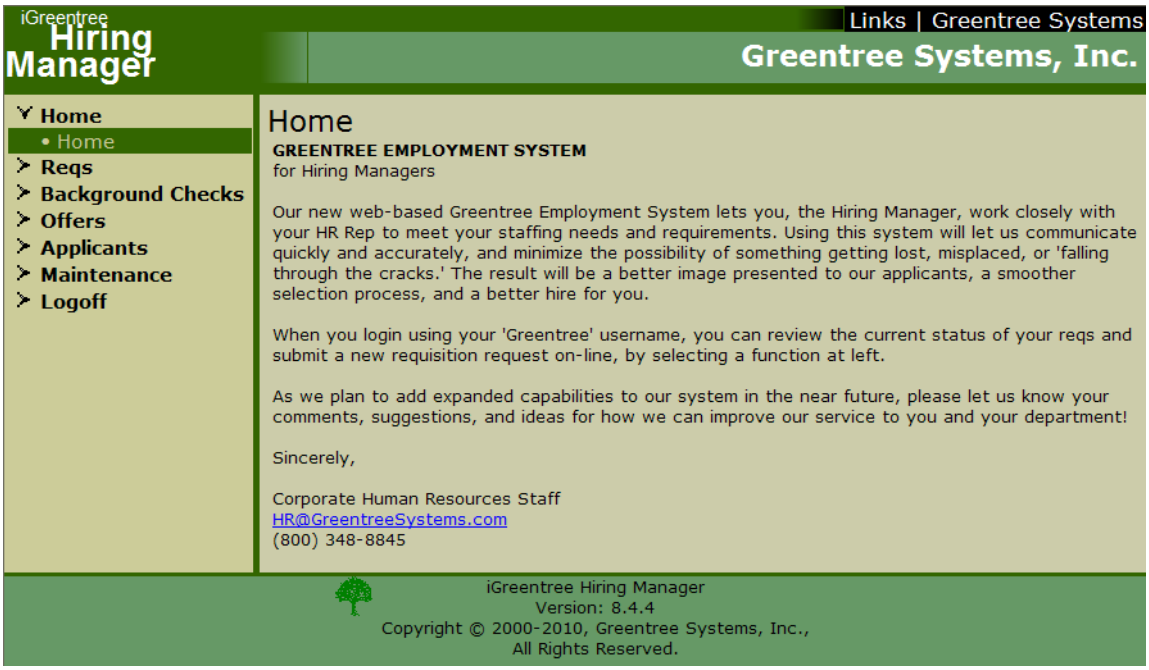
The Hiring Managers will access *Hiring Manager Module* using a browser window. They will need to be provided with the URL for the *Hiring Manager Module's* location. Successful program execution will display the User Login Window, ready to accept a validated Username and that User's password. *Hiring Managers will be given their own Usernames and passwords for the* Hiring Manager Module. *Usernames and passwords are set up for each Hiring Manager record.*

The Hiring Manager can log in by entering a valid Username and password and clicking 

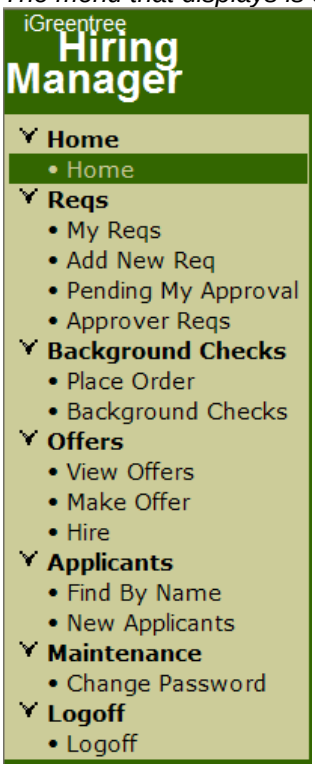
.



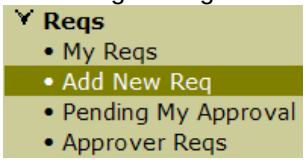
The Hiring Manager will be brought to a Home *page that typically welcomes them to the online Requisition entry tool.*


iGreentree
Hiring Manager
Links | Greentree Systems
Greentree Systems, Inc.
Home
• Home
Reqs
Background Checks
Offers
Applicants
Maintenance
Logoff
Home
GREENTREE EMPLOYMENT SYSTEM
for Hiring Managers
Our new web-based Greentree Employment System lets you, the Hiring Manager, work closely with your HR Rep to meet your staffing needs and requirements. Using this system will let us communicate quickly and accurately, and minimize the possibility of something getting lost, misplaced, or 'falling through the cracks.' The result will be a better image presented to our applicants, a smoother selection process, and a better hire for you.
When you login using your 'Greentree' username, you can review the current status of your reqs and submit a new requisition request on-line, by selecting a function at left.
As we plan to add expanded capabilities to our system in the near future, please let us know your comments, suggestions, and ideas for how we can improve our service to you and your department!
Sincerely,
Corporate Human Resources Staff
HR@GreentreeSystems.com
(800) 348-8845
iGreentree Hiring Manager
Version: 8.4.4
Copyright © 2000-2010, Greentree Systems, Inc.,
All Rights Reserved.

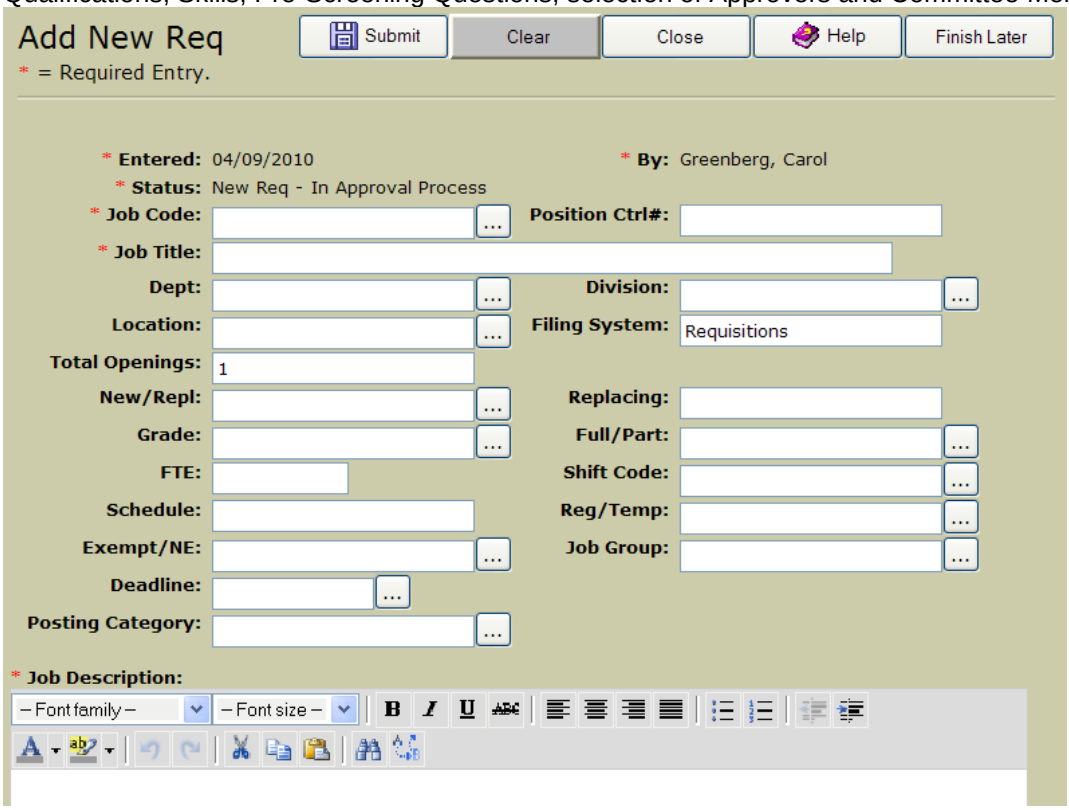
The menu that displays is expandable much like the main menu in iGreentree.

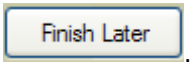


The Hiring Manager can add a Requisition by clicking *Add New Req*.

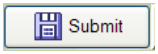


A new screen will be opened and the Hiring Manager may start to enter data for a new job opening. This entry can include basic information about the position (such as Job Title, etc), Job Description and Qualifications, Skills, Pre-Screening Questions, selection of Approvers and Committee Members.



If the Hiring Manager does not have all the information available or cannot finish entering all the data, he/she may choose 

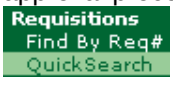
. The information is saved and the User can return to complete the new Requisition by clicking *Add New Req*.

After entering all the data for a new job opening, the Hiring Manager must choose 

He/she will receive a confirmation that the Requisition was successfully entered. If approvers were designated, the first approver will receive an email notification that approval is needed. Each time a decision is made by an approver the originating manager will receive an email notification. If it was a decision to approve, the next approver will also receive an email notification. This process will continue until either an approver disapproves or until all approvers approve. If all approvers approve the Requisition an email is sent to Human Resources.

NOTE: Once the new Requisition has been submitted, the Hiring Manager can no longer edit the Requisition. If it needs to be edited, it must be done by an HR User in iGreentree.

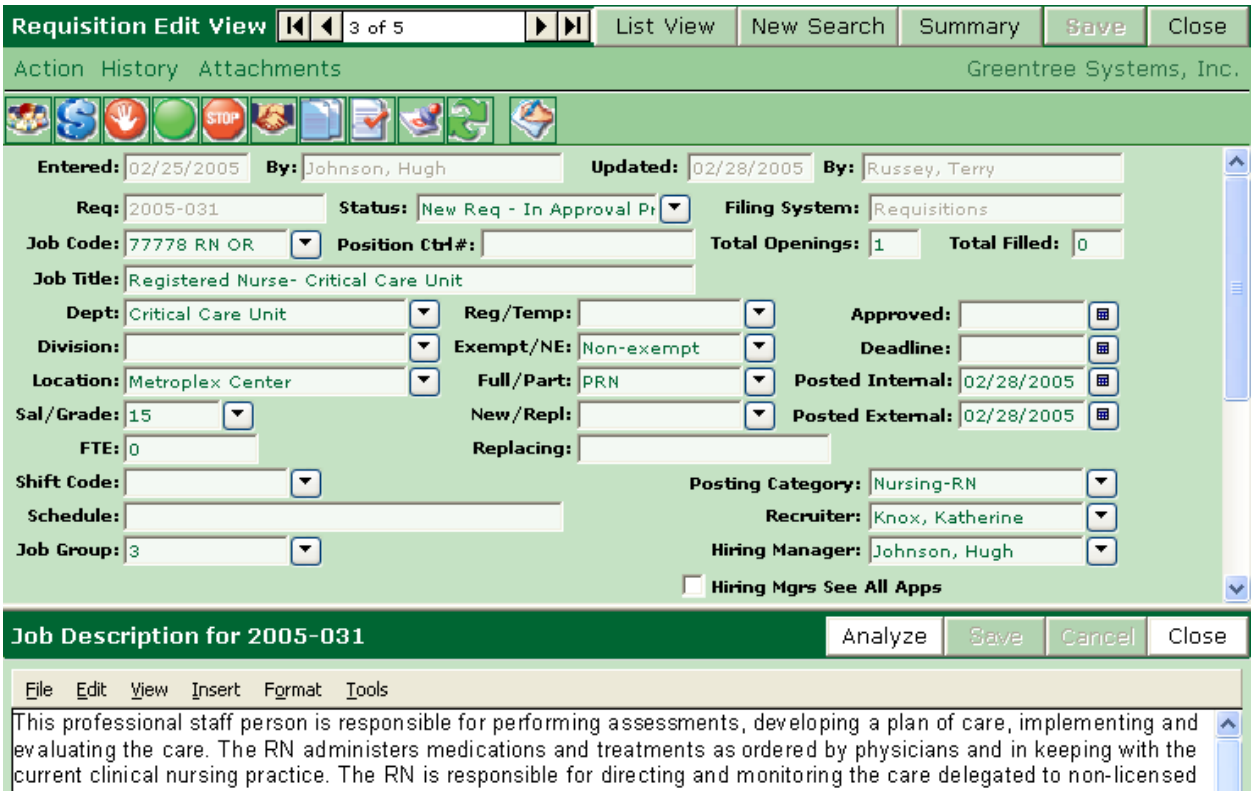
The entered Requisition will be visible in iGreentree for User review even as it is going through the approval process. To view, the user must choose Requisitions *QuickSearch.*



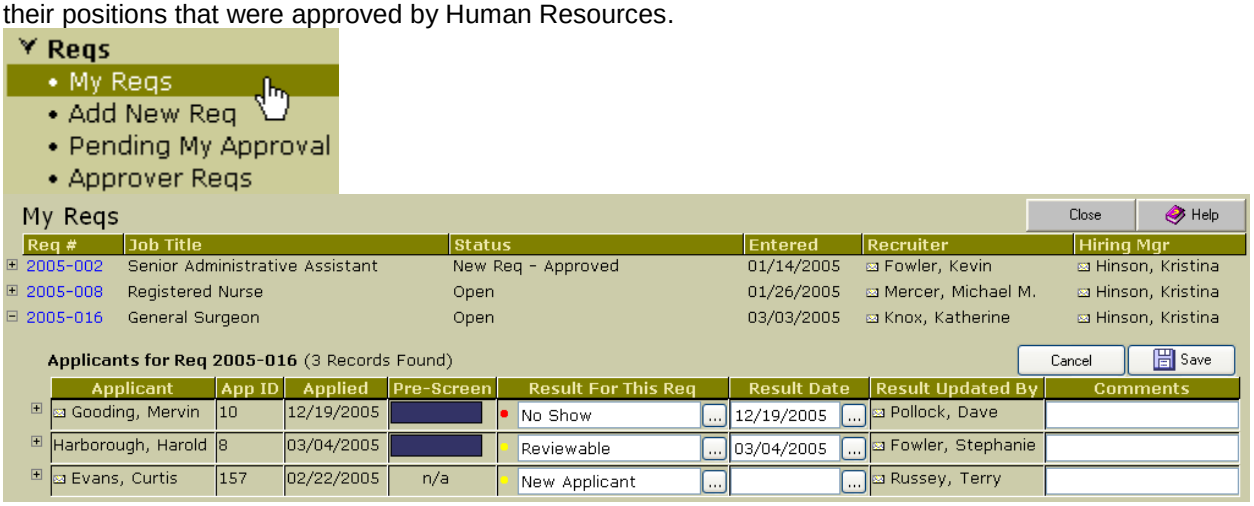
Then, in the *Status* field, select a code that reflects an in-process status (such as *In Approval Process*) and click 

.

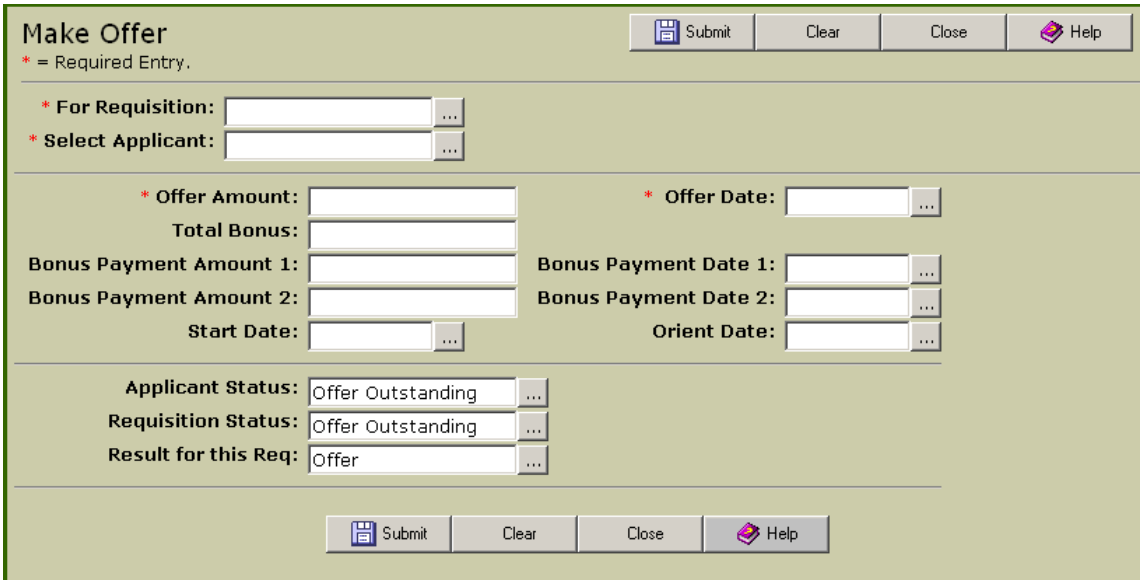
If several Requisitions are found, it is easier to switch to Edit View and review them one at a time. The various Attachments can be viewed to verify all information was entered correctly. The User can decide if this Requisition should post to Candidate Self-Service and take the appropriate steps to make that happen.



The Hiring Manager can use the Hiring Manager Module to approve Requisitions and view submitted Requisition status. In addition, the Hiring Manager can also review the Applicants who have applied for their positions that were approved by Human Resources.

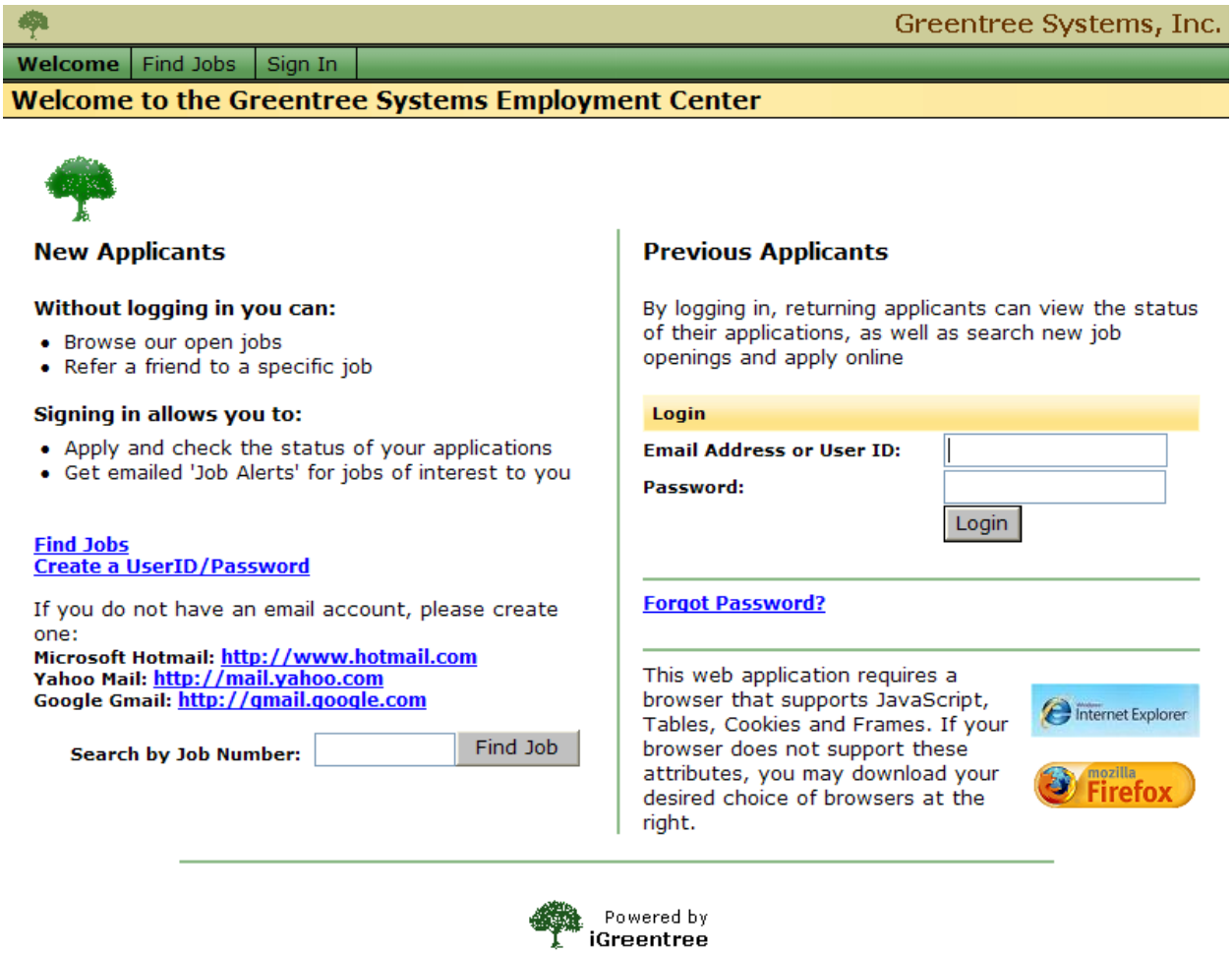

Reqs
• My Reqs
• Add New Req
• Pending My Approval
• Approver Reqs
My Reqs
Close
Help
Req # | Job Title | Status | Entered | Recruiter | Hiring Mgr
2005-002 | Senior Administrative Assistant | New Req - Approved | 01/14/2005 | Fowler, Kevin | Hinson, Kristina
2005-008 | Registered Nurse | Open | 01/26/2005 | Mercer, Michael M. | Hinson, Kristina
2005-016 | General Surgeon | Open | 03/03/2005 | Knox, Katherine | Hinson, Kristina
Applicants for Req 2005-016 (3 Records Found)
Cancel
Save
Applicant | App ID | Applied | Pre-Screen | Result For This Req | Result Date | Result Updated By | Comments
Gooding, Mervin | 10 | 12/19/2005 | No Show | 12/19/2005 | Pollock, Dave
Harborough, Harold | 8 | 03/04/2005 | Reviewable | 03/04/2005 | Fowler, Stephanie
Evans, Curtis | 157 | 02/22/2005 | n/a | New Applicant | Russey, Terry

Hiring Managers can also submit offer requests to Human Resources via the Hiring Manager Module and check on the status of those offers.


Make Offer
* = Required Entry.
Submit
Clear
Close
Help
* For Requisition:
* Select Applicant:
* Offer Amount:
* Offer Date:
Total Bonus:
Bonus Payment Amount 1:
Bonus Payment Date 1:
Bonus Payment Amount 2:
Bonus Payment Date 2:
Start Date:
Orient Date:
Applicant Status:
Offer Outstanding
Requisition Status:
Offer Outstanding
Result for this Req:
Offer
Submit
Clear
Close
Help

Applicant's View

The Candidate Self-Service module (CSS) allows Applicants the option to apply on-line, set up job alerts, and check the status of their Application. They will access the Application from a web page, either through the company's web site or from a kiosk in the office.


Greentree Systems, Inc.
Welcome
Find Jobs
Sign In
Welcome to the Greentree Systems Employment Center
New Applicants
Without logging in you can:
Browse our open jobs
Refer a friend to a specific job
Signing in allows you to:
Apply and check the status of your applications
Get emailed 'Job Alerts' for jobs of interest to you
Find Jobs
Create a UserID/Password
If you do not have an email account, please create one:
Microsoft Hotmail: http://www.hotmail.com
Yahoo Mail: http://mail.yahoo.com
Google Gmail: http://gmail.google.com
Search by Job Number:
Find Job
Previous Applicants
By logging in, returning applicants can view the status of their applications, as well as search new job openings and apply online
Login
Email Address or User ID:
Password:
Login
Forgot Password?
This web application requires a browser that supports JavaScript, Tables, Cookies and Frames. If your browser does not support these attributes, you may download your desired choice of browsers at the right.
Internet Explorer
mozilla Firefox
Powered by iGreentree

The Applicant can first create their online profile which consists of their education, licenses/certificates, work history, etc. and save it. Once this information is saved it can be used to apply to multiple jobs without the need to re-enter the information. The Applicant also has the option of going directly to find a job in which case the profile information will be saved when the Applicant actually applies to a specific job.

The Applicant has several ways to find jobs from the *Welcome* screen.

The first is to *Search by Job Number* to locate a specific position. The Applicant enters the job number and clicks on Find Job. This method is also available on the *Find Jobs* screen.



The Applicant can also find jobs by clicking the **Find Jobs** tab at the top of the Welcome screen or by clicking the blue **Find Jobs** link. Either method takes them to the *Find Jobs* screen where they can either search for a job based using specific criteria or browse different job categories.
Search Jobs allows the Applicant to build their own custom search using predetermined fields.



Browse For Jobs allows the Applicant to review jobs by predetermined categories.



Regardless of which method is used to search, the Applicant will be presented with the Requisition(s) that match his/her search criteria.

Greentree Systems, Inc.

Welcome | My Home Page | Find Jobs | My Profile | Application Status | Job Alerts | Sign Out

SearchJobs Results



Please click on a job link to view the Job Detail.

Return to Previous Page

	Req	Job Title	Location	Department	Shift	Hiring Manager	Recruiter	Schedule
1.	2005-007	Senior Administrative Assistant	Metroplex Center	Accounting	Days	Greenberg, Carol	Mercer, Michael M.	M - F 9:00 - 5:00
2.	2005-019	Senior Administrative Assistant	Metroplex Center	MIS	Days	Greenberg, Carol	Mercer, Michael M.	M - F 9:00 - 5:00
3.	2005-023	Administrative Assistant	Atlanta		Days	Bergman, Pam	Mercer, Michael M.	M - F 8am-4:30pm
4.	2005-024	Administrative Assistant	Atlanta		Days	Greenberg, Carol	Mercer, Michael M.	M - F 7:30am-4pm

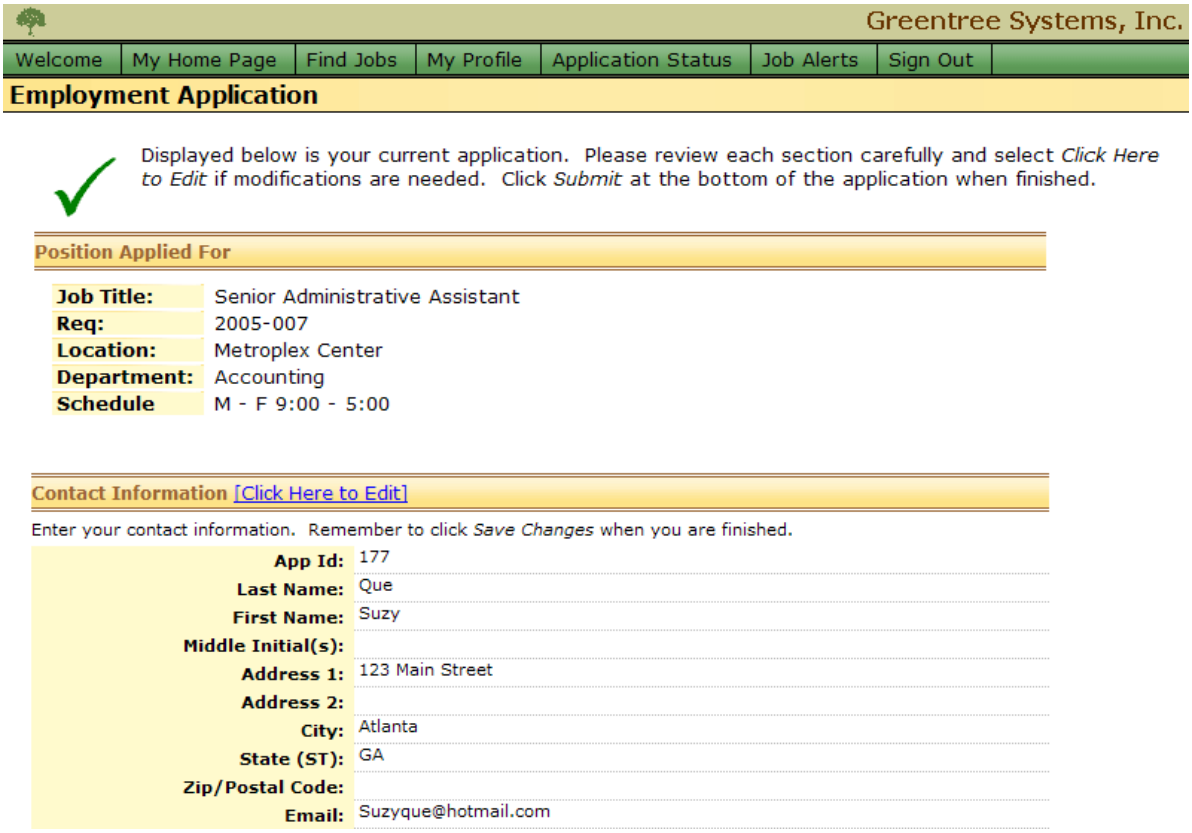
Available Positions: *4*

From this screen, the Applicant can choose to review more specific details for a Requisition by clicking the Requisition number to the left of the *Job Title*.

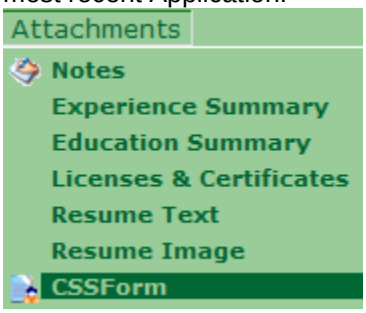

Welcome
My Home Page
Find Jobs
My Profile
Application Status
Job Alerts
Sign Out
Job Detail
To apply for this Senior Administrative Assistant position, click on Complete Application .
Return to Previous Page
Email this job to a friend
Job Title: Senior Administrative Assistant
Req: 2005-007
Location: Metroplex Center
Department: Accounting
Schedule M - F 9:00 - 5:00
Job Description:
RESPONSIBILITIES
Get approval for invoices and submit vouchers for payment. Assist and provide support to department personnel. Run reports, print letters, make travel arrangements. Supervise temporary help. Schedule meetings.
Job Qualifications:
PC expertise, preferably Lotus SmartSuite or Microsoft Office, a plus. At least three years in the Accounting department of a manufacturing company highly desired. Telephone manner must be friendly yet firm.
Complete Application
Return to Previous Page
Help

The Applicant can choose to apply for the position by completing the Application or return to the list of Requisitions to review a different position. When the Applicant applies, the information entered is stored in the Applicant's profile record in iGreentree. If that Applicant returns to CSS and applies again later the stored information in their profile will be used to create a new Application so that the returning Applicant can simply update the information versus having to re-enter it.

The Applicant has one final opportunity to review and edit the different sections of their Application just prior to submitting it.


Greentree Systems, Inc.
Welcome
My Home Page
Find Jobs
My Profile
Application Status
Job Alerts
Sign Out
Employment Application
Displayed below is your current application. Please review each section carefully and select Click Here to Edit if modifications are needed. Click Submit at the bottom of the application when finished.
Position Applied For
Job Title: Senior Administrative Assistant
Req: 2005-007
Location: Metroplex Center
Department: Accounting
Schedule M - F 9:00 - 5:00
Contact Information [Click Here to Edit]
Enter your contact information. Remember to click Save Changes when you are finished.
App Id: 177
Last Name: Que
First Name: Suzy
Middle Initial(s):
Address 1: 123 Main Street
Address 2:
City: Atlanta
State (ST): GA
Zip/Postal Code:
Email: Suzyque@hotmail.com

Each of the Applicant's Application forms are accessible by HR Users in iGreentree under attachments. A User can go to the *Attachment* Menu for an Applicant and choose *CSSForm* to view the Applicant's most recent Application.

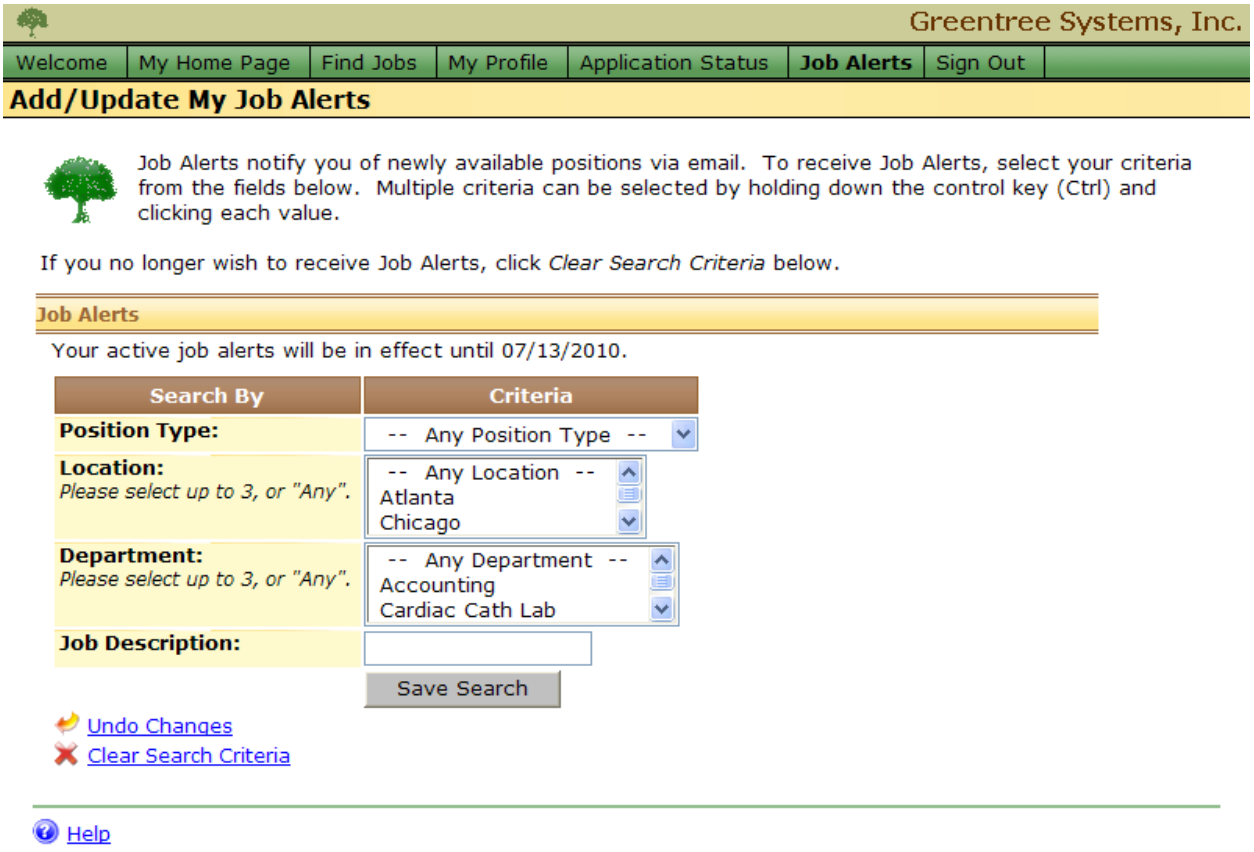




Applicants who apply via CSS can return to the site later and check on the status of any Applications that were submitted either from the *Welcome* screen or the *My Home Page* screen .



If an Applicant does not see any positions of interest, he/she can set up *Job Alerts* that will email the Applicant when positions are posted that match the Applicant's criteria.


Greentree Systems, Inc.
Welcome
My Home Page
Find Jobs
My Profile
Application Status
Job Alerts
Sign Out
Add/Update My Job Alerts
Job Alerts notify you of newly available positions via email. To receive Job Alerts, select your criteria from the fields below. Multiple criteria can be selected by holding down the control key (Ctrl) and clicking each value.
If you no longer wish to receive Job Alerts, click Clear Search Criteria below.
Job Alerts
Your active job alerts will be in effect until 07/13/2010.
Search By
Criteria
Position Type:
-- Any Position Type --
Location:
Please select up to 3, or "Any".
-- Any Location --
Atlanta
Chicago
Department:
Please select up to 3, or "Any".
-- Any Department --
Accounting
Cardiac Cath Lab
Job Description:
Save Search
Undo Changes
Clear Search Criteria
Help

Requisition Management - Hiring Manager Module

Objectives

This chapter is for anyone who will enter Requisition data, or wishes to become better acquainted with the fields on the Requisition base form and how to use those fields. After completing this chapter, the User will be able to:

- Set up Hiring Managers in iGreentree
- Enter new Requisitions via the Hiring Manager Module
- Review and Approve Requisitions via the Hiring Manager Module
- Review logged Applicants via the Hiring Manager Module
- View and Make Offers to Applicants via the Hiring Manager Module
- Hire Applicants via the Hiring Manager Module
- Find Applicants logged to Requisitions

Hiring Managers and iGreentree

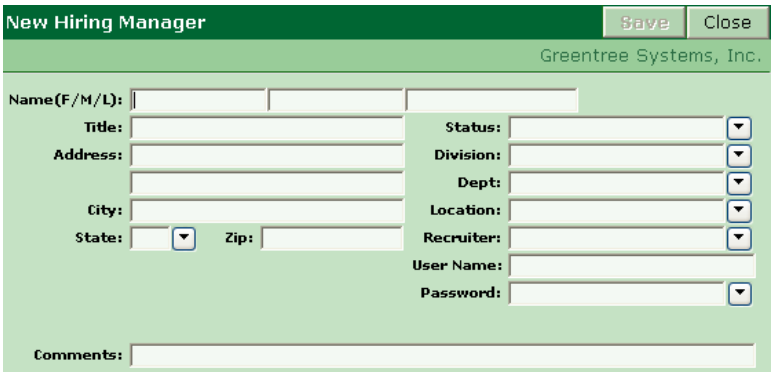
Hiring Manager information is entered into iGreentree to enable the routing of Applicant information, reporting on Requisition activity, and if applicable, provide them with a User name and password to access and manage their designated Requisitions via the Hiring Manager Module.

Entering Hiring Managers

The Hiring Managers within iGreentree should be people within the organization, who are not Users of the iGreentree Application, but need to enter Requisitions for approval and/or record job openings. Hiring Managers can have Requisitions assigned to them; Applicant data can be 'Routed' to them, as well as the recording of 'Interview' and 'Offer' (Hire) details.

To create a Hiring Manager record in iGreentree, select *Add Hiring Mgr* from the *Hiring Mgrs* menu.

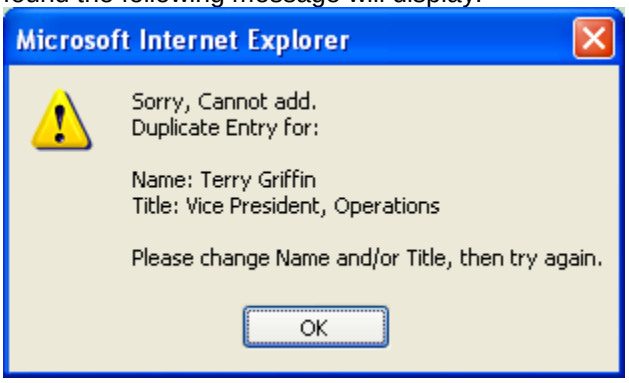




The *New Hiring Manager* screen will display. Enter the Hiring Manager's Name and Title and then choose 

.

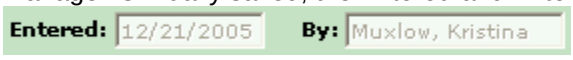
The system will perform a duplicate check to make sure this Hiring Manager does not already exist. A record will be flagged as a duplicate if the Name **AND** Title match an existing record. If a duplicate is found the following message will display:



Select *OK* on the message window and go to *Hiring Mgrs* | *QuickSearch* on the main menu to find the original record and update as appropriate.



If the Hiring Manager is a new person, the system will save and create a record. Once the Hiring Manager is initially saved, the *Entered* and *Entered By* fields are populated automatically.



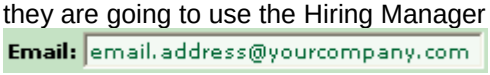
In addition, the Contact Information fields are now displaying: *Home Phone, Work Phone, and Email*.

Hiring Manager Data

The remainder of the fields on the Hiring Manager's record should be completed as needed. At a minimum, Hiring Manager records in iGreentree need to have the following fields populated: FirstName, LastName, Title, Status=Active and a valid Email address. If using the Hiring Manager module, the Status, User Name and Password fields must also be completed.

Email

The Email field is required if the Hiring Manager is to have Applicant information *Routed* to them, or if they are going to use the Hiring Manager module.



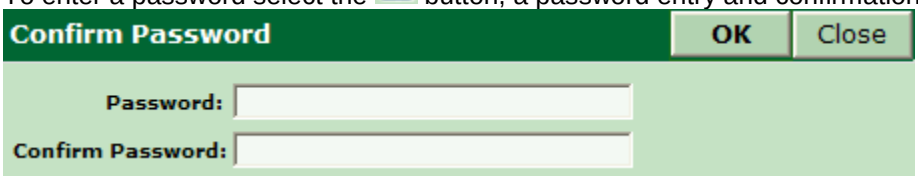
Status
The Status field is used to indicate if the Hiring Manager is currently active and is a valuable field to utilize when creating Hiring Manger reports. Once a Hiring Manager has changed positions or has left the company, the Status should be changed to *Inactive*, as this will allow iGreentree to keep this managers Applicant and Requisition information, but will exclude them from current reports if the report is designed to only include *Active* status managers. An *Inactive* status will also disable their access to the Hiring Manager module.



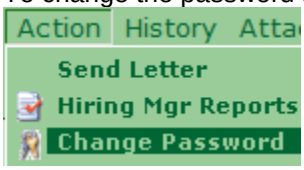
User Name and Password
If the Hiring Manager module is to be used, a *User Name* and *Password* need to be entered. It is suggested that a standard User Name and Password assignment convention be determined so that it is easy for a Hiring Manager to remember, or for a Recruiter to assist them in remembering their information. Password length and complexity can be controlled in System Settings. However, passwords cannot be set as "password" nor can it be a variation of the assigned User Name.



To enter a password select the  button, a password entry and confirmation window will display.



To change the password assigned to the Hiring Manager select Action, Change Password.



A new window will display that will allow you to change the password.

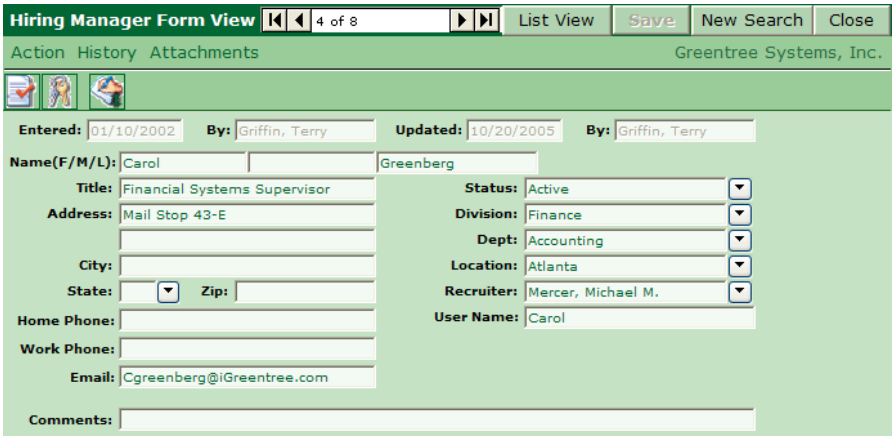


NOTE: Greentree recommends that you clear the User Name field from a Hiring Manager's record should they no longer need access to the Hiring Manager module

When finished click OK to save your changes.

You may also run this action by selecting the quick launch button  located on the toolbar.

Other Fields
The remainder of the Hiring Manager fields may be completed as desired. For instance if reports will contain the Hiring Manager's location, be sure to complete the *Location* field on each Hiring Manager's record.



Requisitions in Hiring Manager Module

Requisitions can be entered into iGreentree in two ways: directly entering into iGreentree by HR Users, or entered via the Hiring Manager module by the Hiring Manager.

Logging In

Hiring Managers can enter and record their own Requisition activity with the Hiring Manager module.

Access to the Hiring Manager module is usually attained via a direct internet link. If a direct link is not available, the User can type the URL into the address field of an Internet Explorer browser. Check with the web server administrator if unsure of the internet location (URL).

Enter the *User Name* and *Password* of a valid Hiring Manager in the Hiring Manager login screen. Advancing to the *Login Password* field can be done by either selecting the Tab key or using the mouse to click into the field. Click *Login*. If the password has been forgotten, it can be retrieved by clicking on the Forgot Password? link which will send the password to the specified email address.

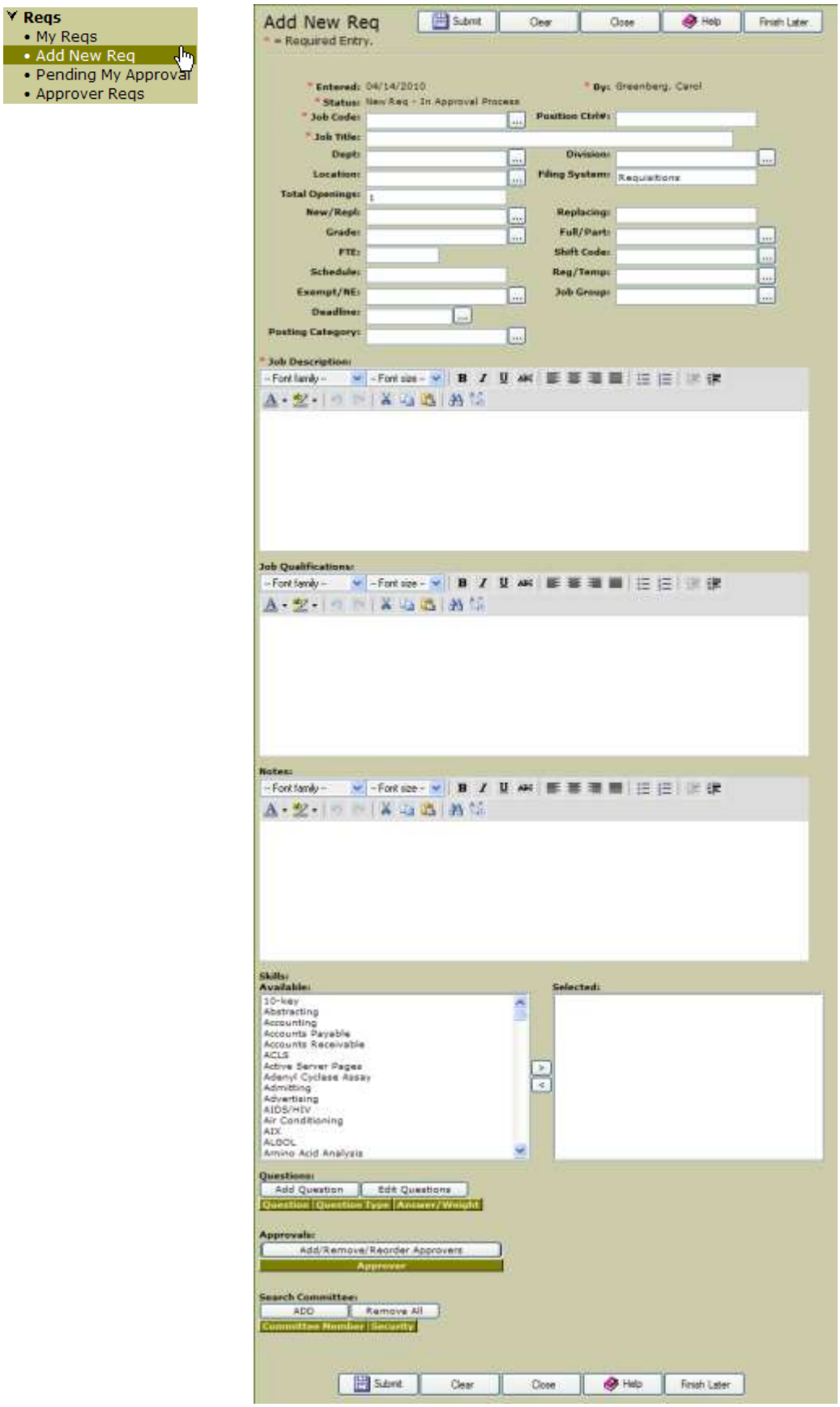


The first screen a Hiring Manager views upon successful login has the main menu to the left and a welcome message to the right.

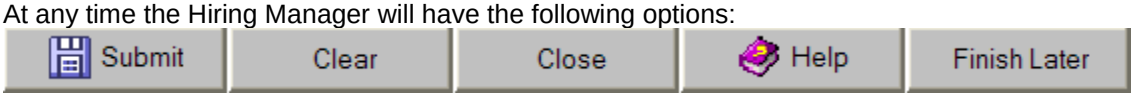

iGreentree
Hiring Manager
Links | Greentree Systems
Greentree Systems, Inc.
Home
Home
Reqs
Background Checks
Offers
Applicants
Maintenance
Logoff
Home
GREENTREE EMPLOYMENT SYSTEM
for Hiring Managers
Our new web-based Greentree Employment System lets you, the Hiring Manager, work closely with your HR Rep to meet your staffing needs and requirements. Using this system will let us communicate quickly and accurately, and minimize the possibility of something getting lost, misplaced, or 'falling through the cracks.' The result will be a better image presented to our applicants, a smoother selection process, and a better hire for you.
When you login using your 'Greentree' username, you can review the current status of your reqs and submit a new requisition request on-line, by selecting a function at left.
As we plan to add expanded capabilities to our system in the near future, please let us know your comments, suggestions, and ideas for how we can improve our service to you and your department!
Sincerely,
Corporate Human Resources Staff
HR@GreentreeSystems.com
(800) 348-8845
iGreentree Hiring Manager
Version: 8.4.0
Copyright © 2000-2009, Greentree Systems, Inc.,
All Rights Reserved.

Submitting a Requisition

To begin the Requisitioning process, the Hiring Manager must click on A*dd New Req* from the *Reqs* main menu. This will bring up the Requisition *Add New Req* form.


Reqs
My Reqs
Add New Req
Pending My Approval
Approver Reqs
Add New Req
Submit
Clear
Close
Help
Finish Later
* = Required Entry.
* Entered: 04/14/2010
* By: Greenberg, Carol
* Status: New Req - In Approval Process
* Job Code:
Position Ctrl#:
* Job Title:
Dept:
Division:
Location:
Filing System: Requisitions
Total Openings: 1
New/Repl:
Replacing:
Grade:
Full/Part:
FTE:
Shift Code:
Schedule:
Reg/Temp:
Exempt/NE:
Job Group:
Deadline:
Posting Category:
* Job Description:
Job Qualifications:
Notes:
Skills:
Available:
Selected:
10-key
Abstracting
Accounting
Accounts Payable
Accounts Receivable
ACLS
Active Server Pages
Adenyl Cyclase Assay
Admitting
Advertising
AIDS/HIV
Air Conditioning
AIX
ALGOL
Amino Acid Analysis
Questions:
Add Question
Edit Questions
Question | Question Type | Answer/Weight
Approvals:
Add/Remove/Reorder Approvers
Approver
Search Committee:
ADD
Remove All
Committee Member | Security
Submit
Clear
Close
Help
Finish Later

At any time the Hiring Manager will have the following options:



The *Submit* option will submit the Requisition to iGreentree and begin the approval process if all required fields on the *Add New Req* form have been completed and one or more approvers has been specified. Once a Requisition is submitted, the Hiring Manger can not edit the fields.

The *Clear* option will remove data from all fields that have been populated.

The *Close* option will close the *Add New Req* screen WITHOUT saving the data that may have been entered prior to the *Close* option being selected.

The *Help* option will display tips and suggestions for entering a new req. The *Close* button in the *Help* window should be selected to return to the *Add New Req* form.

The Finish Later option allows the Hiring Manger to save a partially completed Requisition and return later to complete it and submit it. To return to the incomplete Requisition, just go to *Reqs* | *Add New Req* on the menu and it will appear.

Data Entry on the Add New Req Screen

There are many pieces of information that can be collected from the submitting Hiring Managers. This information will be entered into one of three types of fields.

Text Fields

These are free-text fields. Notice there is no select list icon for these fields, since it is not limited to a pre-set list of code values. The red asterisk indicates the field is required.

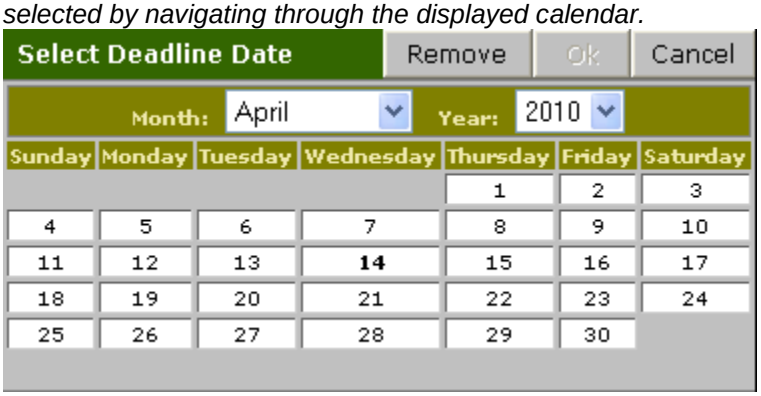


Date Fields

These will record the identified date information for the Requisition.



To enter a date, click on the ... button. *The current date is highlighted in bold, but any date can be selected by navigating through the displayed calendar.*



To clear a date, click on the ... button then click on the Remove button

Coded Fields

These are fields whose values are limited to a pre-defined set of code values.

Only values displaying when the ... button is selected may be used to populate the field. The red asterisk indicates the field is required.



Auto-Fill fields

Some coded fields may be set up to populate related fields automatically. The Hiring Manager may have the option to override any items that are auto-filled. iGreentree *Maintenance* | *Codes* is where auto-fill information is identified. For example, JobCode is a coded field that has the auto-fill feature by default. JobCode will auto-fill the below identified fields on the *Add New Req* form with the information displaying in the 'Value' column when the Job Code value '012345' is selected by the Hiring Manager. Any field name with an '(A)' after it indicates an auto-fill field if the information is provided.



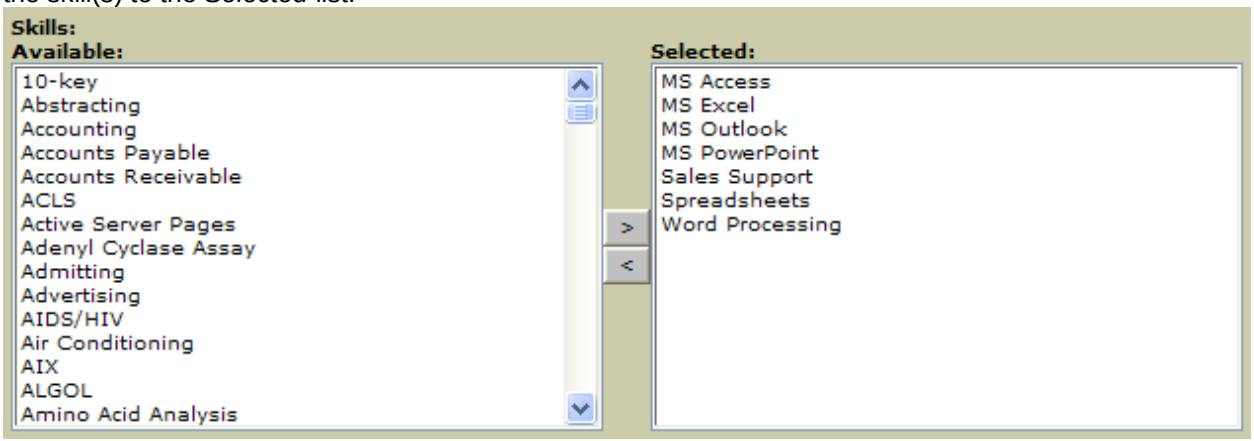
Additional Info for "012345 - Programmer I"

Column	Value
AssessmentInterviewID	
AssessmentPreviewID	
ExemptNE (A)	Non-exempt
Grade (A)	16
HiringMgrReqTemplate (A)	Programmer I
JobGroup (A)	7
Title (A)	Programmer I

Entering data on this field will populate other fields such as Job Title, Job Group, Exempt/NE, and Grade. 'HiringMgrReqTemplate(A)' identifies an existing Requisition template in iGreentree that can help populate all other Requisition fields and Attachments including: Job Description, Job Qualifications, Skills and CSS Questions. This feature will save time and increase data accuracy and consistency.

Adding Skills to a Requisition

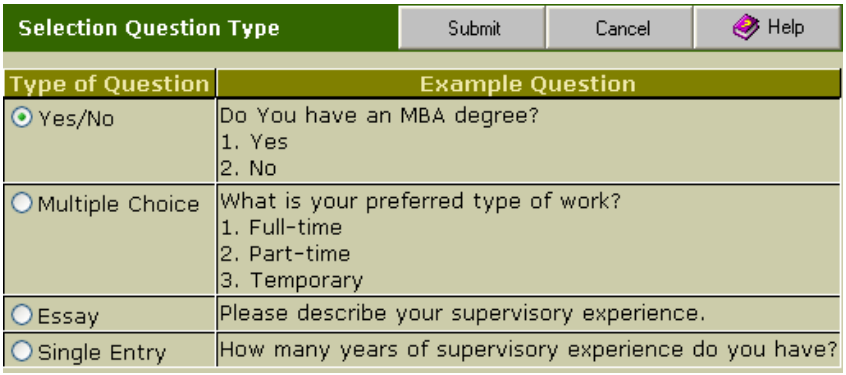
The Hiring Manager can select desired *Skills* for Applicants applying to their Requisition. These identified *Skills* are the skills that will be presented to all Applicants who apply on-line for the particular Requisition. *Skills* are added by highlighting the desired skill(s) in the *Available* list and clicking on the arrow to move the skill(s) to the *Selected* list.



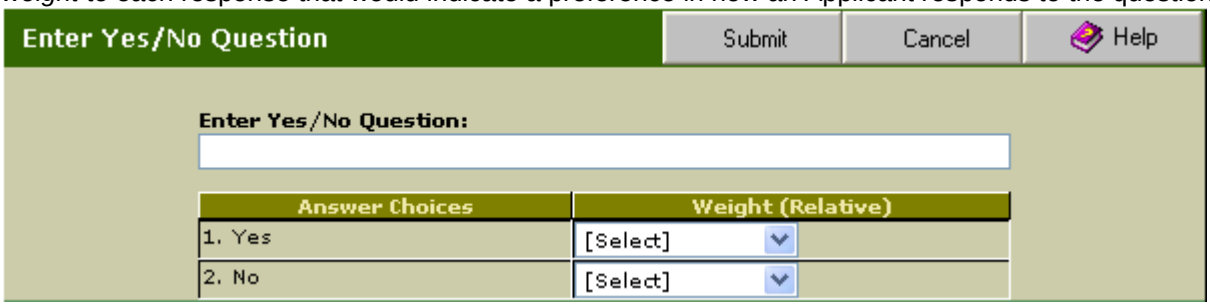
Adding Questions to a Requisition

The Hiring Manager can select to add 'pre-screen' questions that will be asked of all Applicants who apply on-line for the particular Requisition. Some questions can have answers weighted based on the appropriateness of the answer in qualifying an Applicant for the Requisition.

CSS Questions are added by selecting the *Add Question* button on the *Add New Req* form. A Question Type window will display. Select the type of question to be added, and select the *Submit* button. There are four (4) types of questions (shown below).

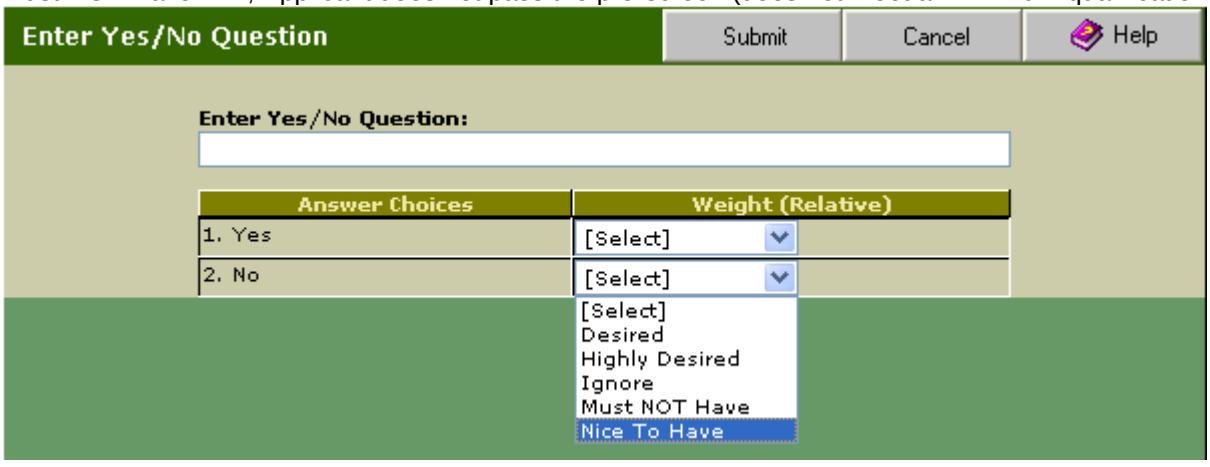


Yes/No Question Type:
This question type allows a question to be asked of the Applicant that would require a response of 'Yes' or 'No'. After entering the question of interest in the box provided, the Hiring Manager needs to assign a *weight* to each response that would indicate a preference in how an Applicant responds to the question.



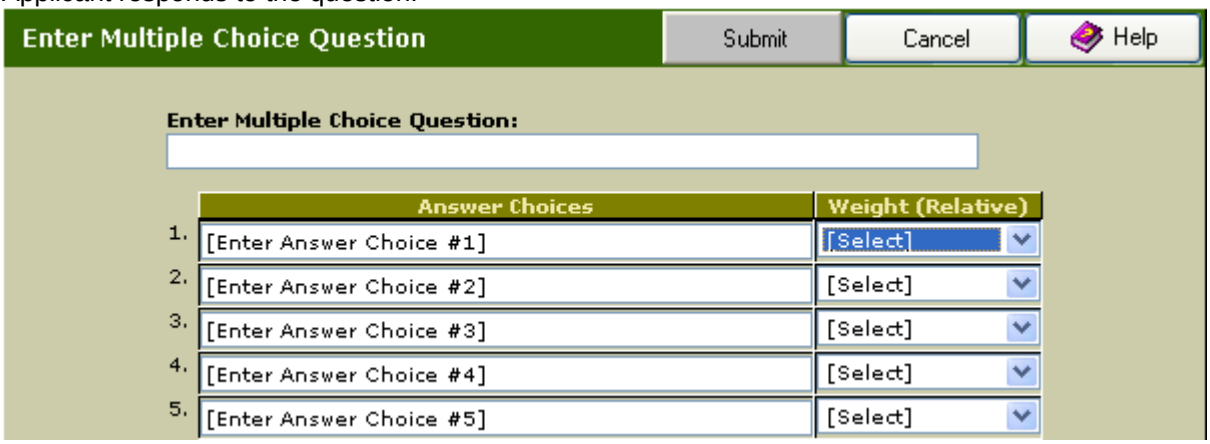
The weight can be translated to the following point values (set as defaults):

Highly Desired = 6
Desired = 4
Nice To Have = 1
Ignore = 0 and
Must NOT Have = -1, Applicant does not pass the pre-screen (does not meet all minimum qualifications)

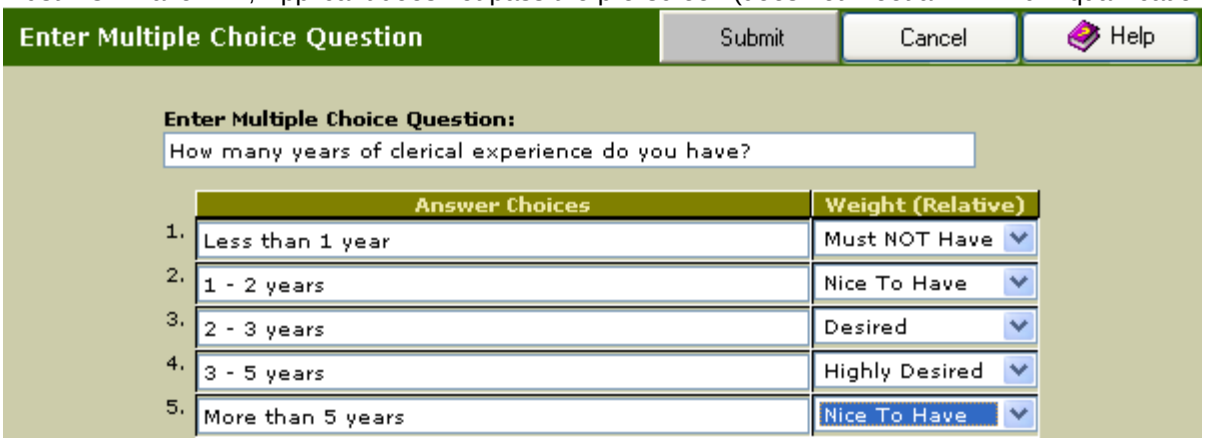


When finished, select the  button.

Multiple Choice Question Type:
This question type allows a question to be asked of the Applicant that would have a list of possible answers. After entering the question of interest in the box provided, the Hiring Manager needs to define the possible answers and assign a *weight* to each answer that would indicate a preference in how an Applicant responds to the question.

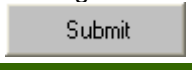


Again, the weight can be translated to the following point values (set as defaults):
Highly Desired = 6
Desired = 4
Nice To Have = 1
Ignore = 0 and
Must NOT Have = -1, Applicant does not pass the pre-screen (does not meet all minimum qualifications)

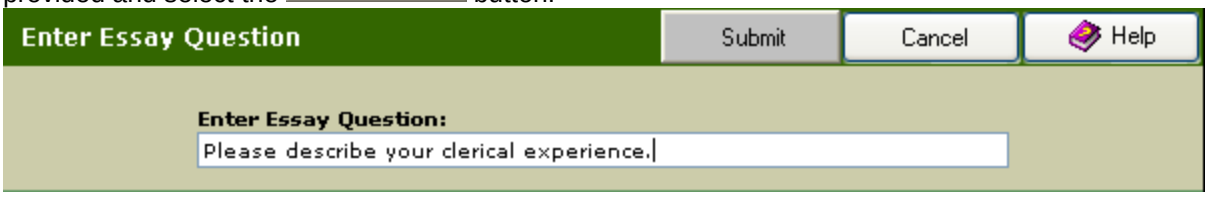

Enter Multiple Choice Question
Submit
Cancel
Help
Enter Multiple Choice Question:
How many years of clerical experience do you have?
Answer Choices
Weight (Relative)
1. Less than 1 year Must NOT Have
2. 1 - 2 years Nice To Have
3. 2 - 3 years Desired
4. 3 - 5 years Highly Desired
5. More than 5 years Nice To Have

When finished, select the 

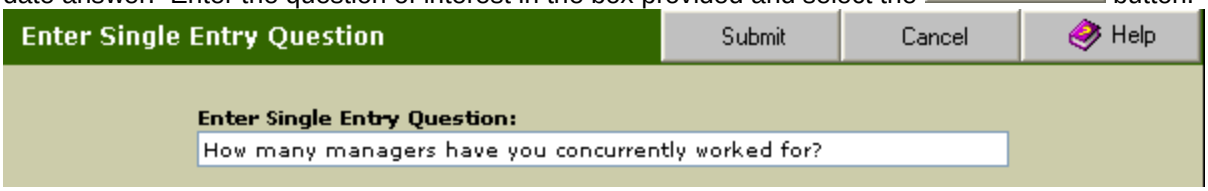
button.

Essay Question Type:
This question type allows a question to be asked of the Applicant that requires a brief explanation and could not be answered in using one of the other question types. Enter the question of interest in the box provided and select the 

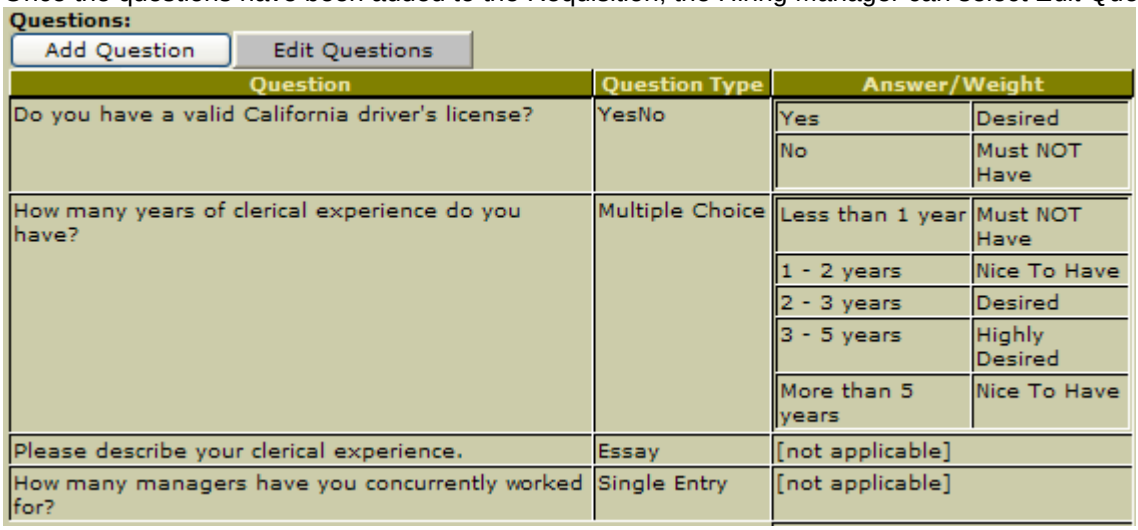
button.



Single Entry Question Type:
This question type allows a question to be asked of the Applicant that requires a minimal text, number or date answer. Enter the question of interest in the box provided and select the Submit button.

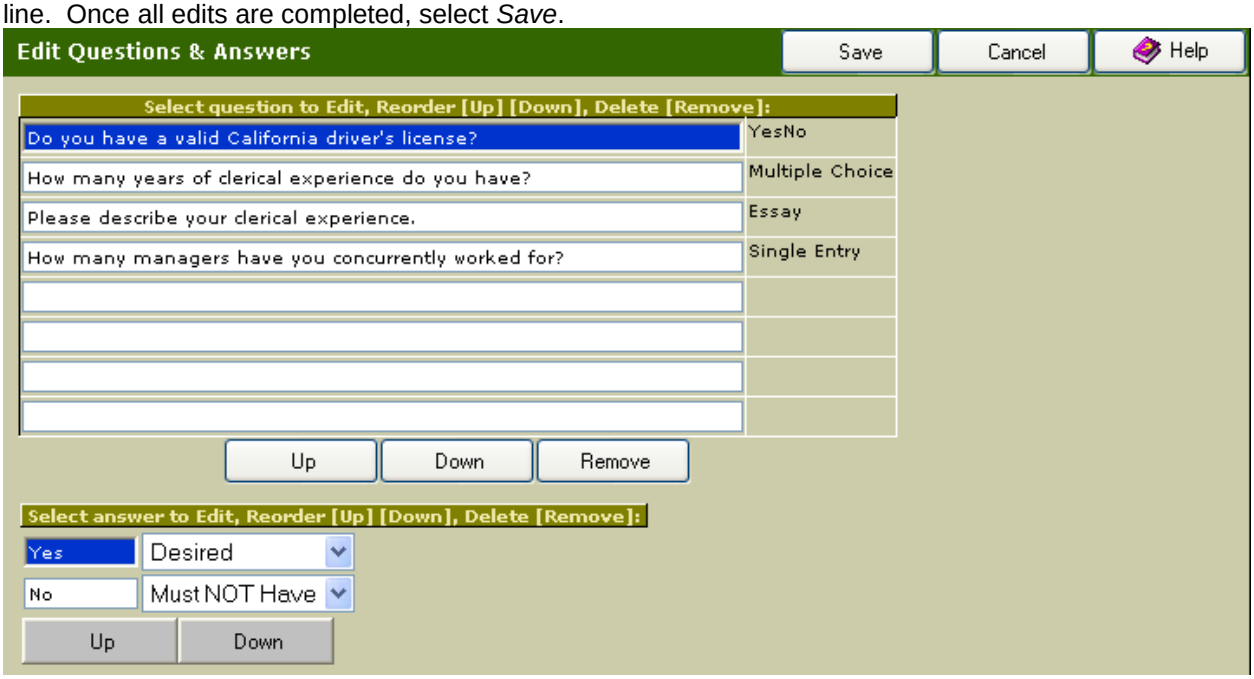


Once the questions have been added to the Requisition, the Hiring Manager can select *Edit Questions.*



Question	Question Type	Answer/Weight	
Do you have a valid California driver's license?	YesNo	Yes	Desired
		No	Must NOT Have
How many years of clerical experience do you have?	Multiple Choice	Less than 1 year	Must NOT Have
		1 - 2 years	Nice To Have
		2 - 3 years	Desired
		3 - 5 years	Highly Desired
		More than 5 years	Nice To Have
Please describe your clerical experience.	Essay	[not applicable]	
How many managers have you concurrently worked for?	Single Entry	[not applicable]	

Editing the questions can be as simple as re-ordering – highlight a question and click on the *Up* or the *Down* buttons provided, they can completely *Remove* a question from the Requisition, or they can modify the answer selection and weighting presented to the Applicant when they apply for the Requisition on-line. Once all edits are completed, select *Save*.

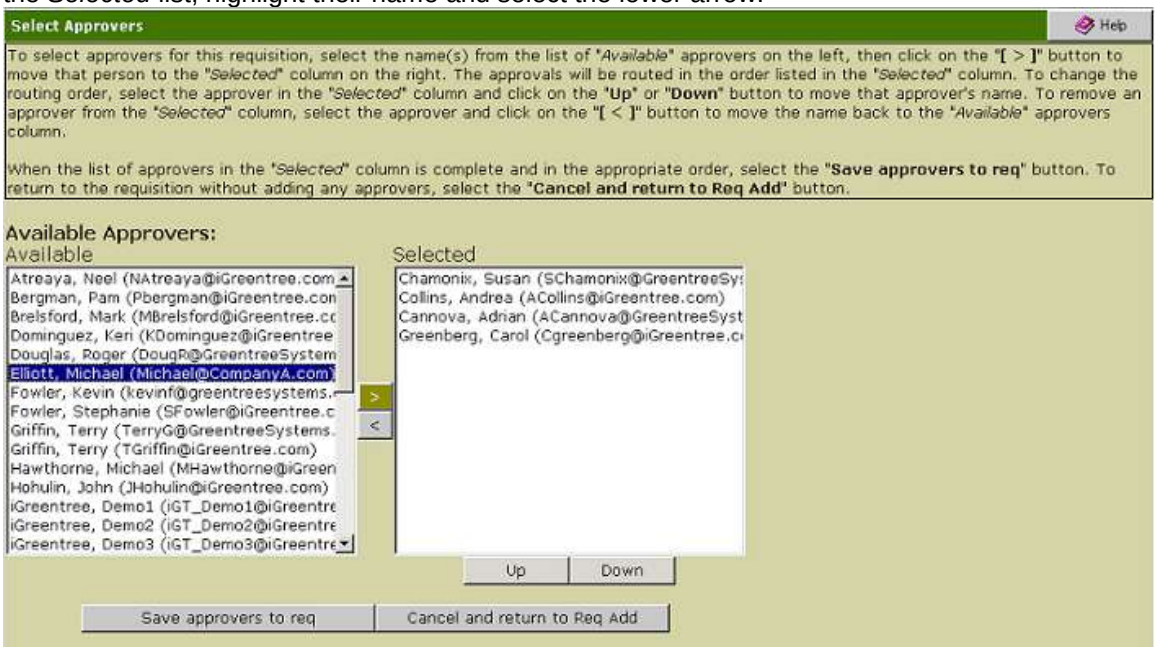


Adding Approvers to a Requisition

The Hiring Manager can also identify Approvers for their Requisition. The individuals selected will receive an email notification that they need to review a Requisition for approval. To add approvers the Hiring Manager will click on the *Add/Remove/Reorder Approvers* button.



The Requisition Approvers screen will display. To add Approvers, highlight the Approver's name and click the top arrow to move the name from the *Available* list to the *Selected* list. To remove an Approver from the *Selected* list, highlight their name and select the lower arrow.


Select Approvers
Help
To select approvers for this requisition, select the name(s) from the list of "Available" approvers on the left, then click on the "[>]" button to move that person to the "Selected" column on the right. The approvals will be routed in the order listed in the "Selected" column. To change the routing order, select the approver in the "Selected" column and click on the "Up" or "Down" button to move that approver's name. To remove an approver from the "Selected" column, select the approver and click on the "[<]" button to move the name back to the "Available" approvers column.
When the list of approvers in the "Selected" column is complete and in the appropriate order, select the "Save approvers to req" button. To return to the requisition without adding any approvers, select the "Cancel and return to Req Add" button.
Available Approvers:
Available
Atreaya, Neel (NAtreaya@iGreentree.com
Bergman, Pam (Pbergman@iGreentree.con
Brelsford, Mark (MBrelsford@iGreentree.cc
Dominguez, Keri (KDominguez@iGreentree
Douglas, Roger (DougR@GreentreeSystem
Elliott, Michael (Michael@CompanyA.com)
Fowler, Kevin (kevinf@greentreesystems.
Fowler, Stephanie (SFowler@iGreentree.c
Griffin, Terry (TerryG@GreentreeSystems.
Griffin, Terry (TGriffin@iGreentree.com)
Hawthorne, Michael (MHawthorne@iGreen
Hohulin, John (JHohulin@iGreentree.com)
iGreentree, Demo1 (iGT_Demo1@iGreentre
iGreentree, Demo2 (iGT_Demo2@iGreentre
iGreentree, Demo3 (iGT_Demo3@iGreentre
>
<
Selected
Chamonix, Susan (SChamonix@GreentreeSy
Collins, Andrea (ACollins@iGreentree.com)
Cannova, Adrian (ACannova@GreentreeSyst
Greenberg, Carol (Cgreenberg@iGreentree.c
Up
Down
Save approvers to req
Cancel and return to Req Add

Once all the approvers are on the *Selected* list the Hiring Manager should reorder them to appear in the appropriate approval order. The first name on the list will receive the first notice to approve; the second name on the list will receive the second notice, and so forth until all Approvers have approved. Highlight the name to reorder and select the *Up* or *Down* button.



When all Approvers have been selected and are listed in the appropriate order, select *Save approvers to req*. The process of adding approvers can be canceled by choosing *Cancel and return to Req Add.*

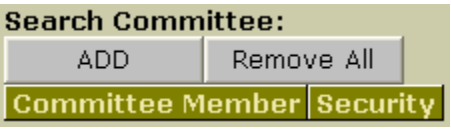


The selected approvers will be listed under the *Approvals* section.

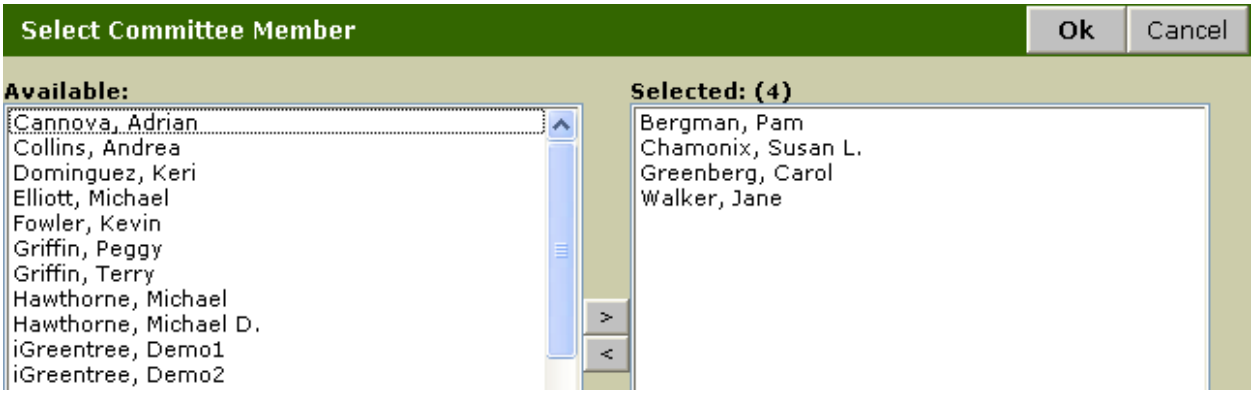


Adding Search Committee Members to a Requisition

The Hiring Manager can also designate other Hiring Managers to use the *Hiring Manager Module* to comment, review and/or update the Applicants that apply for a particular position. The individuals selected will receive an email notification. To add Search Committee Members the Hiring Manager will click on the *Add* button under *Search Committee*.



The Search Committee screen will display. To add Committee Members, highlight the Member's name and click the top arrow to move the name from the *Available* list to the *Selected* list. To remove an Approver from the *Selected* list, highlight their name and select the lower arrow.



Please note that for individuals to be included in this list they must be set up as Hiring Managers in iGreentree. In addition, they will need to be assigned Hiring Manager User Names and Passwords so they can log in and view Requisitions for which they are Search Committee members.

The selected Search Committee Members will be displayed under *Search Committee.*



The Hiring Manager must now select a Security level (default is Read Only). There are two levels to choose from:
Read Only - Allows the Committee Member to view the Applicant and all available documents. As well as enter comments, which can be viewed by other Committee Members, including the Hiring Manager.
Update - Allows the Committee Member the same privileges as Read Only, plus they can update the *App/Req Result* and *App/Req Result Date* for Applicants or add additional Search Committee members if necessary.

To remove a single Search Committee Member click on the next to the Committee Member's name.

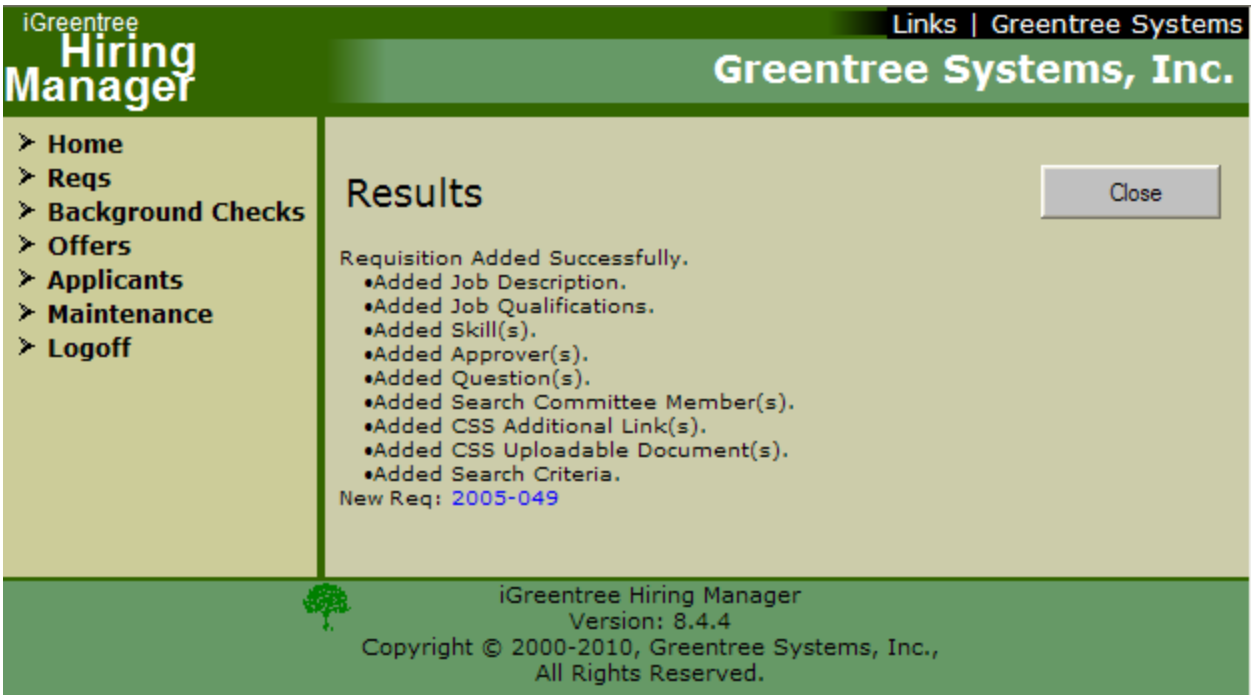
To remove all Committee Members from the list select Remove All.

Submitting a Completed Requisition

Upon completion of the *Add New Req* form the Hiring Manager will need to Submit the Requisition to complete the submittal process. *Fields marked with a * are required. A Hiring Manager must fill in all required fields for a successful submittal. If a required field has not been completed, and an attempt is made to* Submit*, an error message will appear*.



When a Requisition is added the *Add New Req* form will close and the Hiring Manager will receive a confirmation that the Requisition was successfully added, and which Attachments were completed at the time of submittal.



Adding Documents to a Requisition

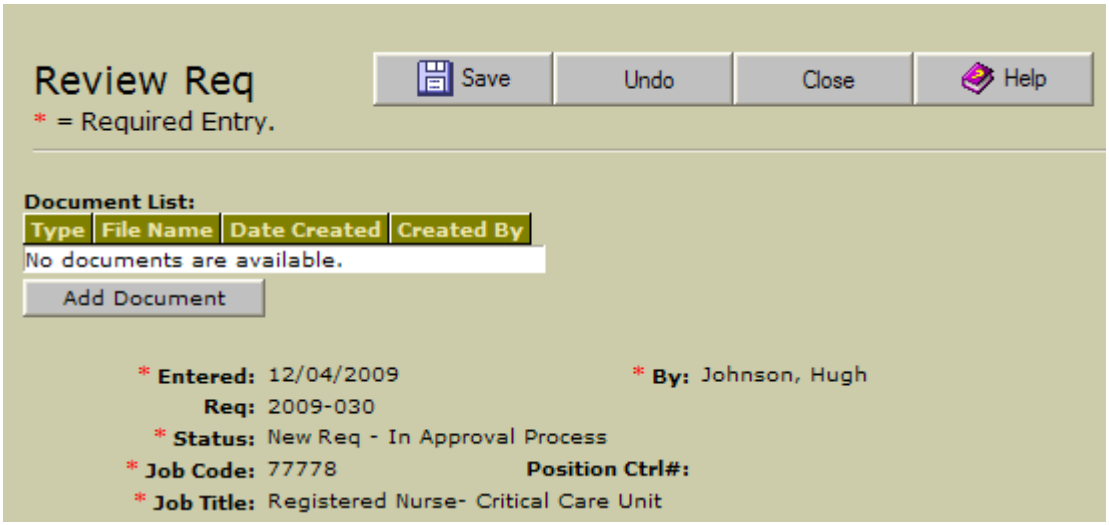
After the Requisition has been submitted, the Hiring Manager can add documents to the Requisition that can be viewed and used by the Approvers during the approval process. To add a document to a Requisition, the Hiring Manager clicks on *My Reqs* from the *Reqs* menu.



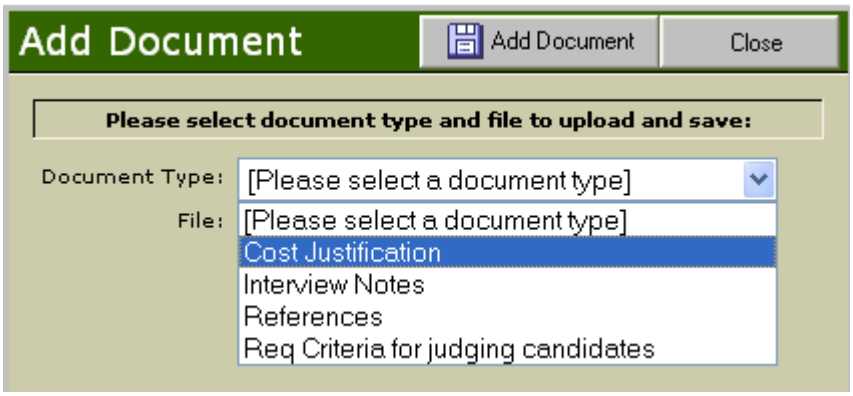
A list of all the User's Requisitions appears.

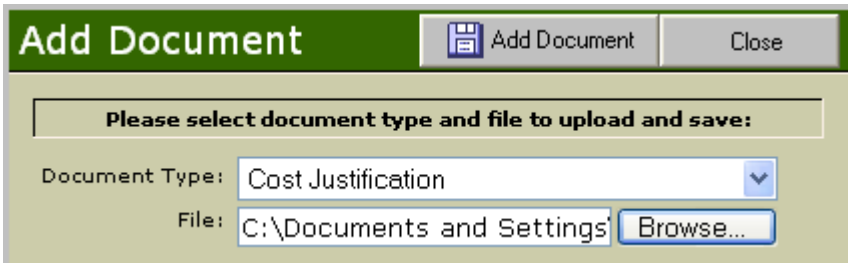

My Reqs
Close
Help
Req # | Job Title | Status | Entered | Recruiter | Hiring Mgr
2009-025 | Registered Nurse - Cath Lab | Open | 11/04/2009 | Mercer, Michael M. | Johnson, Hugh
2009-030 | Registered Nurse- Critical Care Unit | New Req - In Approval Process | 12/04/2009 | Knox, Katherine | Johnson, Hugh
2009-031 | Registered Nurse- Cath Lab | Open | 12/04/2009 | Cannova, Adrian | Johnson, Hugh
2009-036 | Medical Technician | Open | 12/10/2009 | Chamonix, Susan L. | Johnson, Hugh
Page: 1 of 1 (4 Records Total)
List These Reqs: Current

Click on the specific *Req #* that is shown in blue. For example, 2009-030. The Review Req form appears for that specific Requisition.

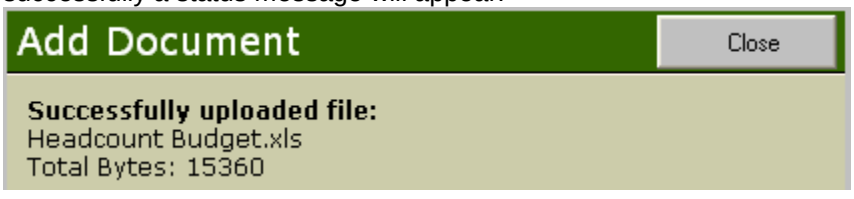


Click on the Add Document button on the Review Req screen. When the Add Document screen appears, select the Document Type and locate the file to be uploaded.





Click on the Add Document button to upload the document. When it has been uploaded successfully a status message will appear.



Click the Close button to return to the Review Req screen.

In the example below, a Headcount Budget spreadsheet substantiating the need for additional personnel has been added to the Requisition.



To delete a document from a Requisition, click the button located to the right of the document.

Approval Process and Approval Audit of the Completed Requisition

Once the Requisition 'Submit' has taken place, multiple emails may be generated (depending on Approver and Search Committee information entered). The first email is sent to the Initiator (Hiring Manager) stating the Requisition has entered the approval process. The next email is sent to the first Approver attached to the Requisition. The final email is sent to the Search Committee Members. Please refer to the Hiring Manger Module and Letters Maintenance for information regarding the creation and modification of letters used by the approval process and Search Committee features.

After the Requisition has been approved by the first Approver another two emails are generated. The first is sent to the Initiator giving them an approval status update. The second email is sent to the next Approver. This series of emails will continue until the final Approver is sent an email.

Upon final approval, two final emails are generated. One is sent to the Initiator stating the approvals have been completed. The second is sent to the Recruiter designated on the Requisition. At this point, the Recruiter would typically review the record and make necessary changes including (but not limited to) changing the *Status* to an 'IsOpen' value and entering the necessary posting date(s) and *Posting Category* information for the candidate site(s).

In the event one Approver decides to reject or not approve the Requisition, only the Initiator will receive notification that the Requisition has been 'Not Approved.' If the Initiator needs to make changes and then continue with the approval process they will need to contact the assigned Recruiter. If requested by the Initiator, the Recruiter can then go into iGreentree and make modifications to the original Requisition.

Once the changes are completed, the Recruiter should change the *Status* value to 'New Req-In Approval Process.' They will also need to go to the *Attachments* | *Approvers* menu option, change the Approver's (the one who rejected) *Approval Status* from 'Not Approved' to 'Not Reviewed.' In doing this, the system will again send a notification to the rejecter ('Send Notification' should NOT be selected), to have them approve the modified Requisition. Once they approve, the approval process will continue on as described above. The complete approval audit trail can be viewed by the Recruiter under the 'History' of the Requisition.



Approvers Audit For 2005-040 Close

Transaction	Approver	Approval Status	Status Date	Entered By	Updated By
Edit	Bergman, Pam	Approved	04/15/2010	Greenberg, Carol	Griffin, Peggy
Edit	Myers, Gary	Approved	04/15/2010	Greenberg, Carol	Griffin, Peggy
Add	Fowler, Kevin	Not Reviewed	03/17/2010	Griffin, Peggy	
Add	Griffin, Terry	Not Reviewed	03/17/2010	Griffin, Peggy	
Add	Bergman, Pam	Not Reviewed	03/15/2010	Greenberg, Carol	
Add	Myers, Gary	Not Reviewed	03/15/2010	Greenberg, Carol	

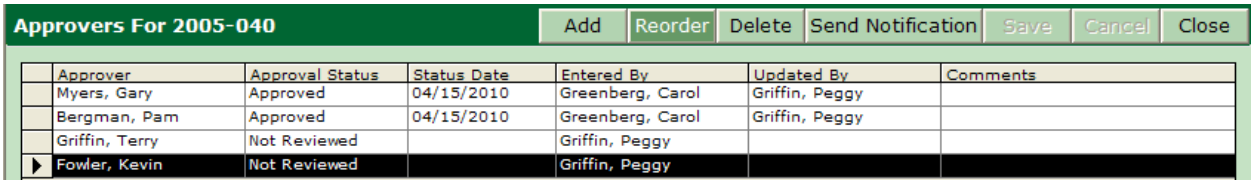
NOTE: There are two options for setting up the approval process in Hiring Manager. In *Maintenance* | *System Settings* there are two types of 'Req Approval Process Type' - Parallel and Serial.

Parallel: All designated Approvers must review and approve the Requisition.
Serial: Designated Approvers are assigned an approval hierarchy. For example, if Approver3 approves the Requisition, this will override the need for Approver1 and Approver2 to review and approve the Requisition.

There are two ways to a Recruiter can override the originally designated approval order if necessary. The Recruiter can go to the *Attachments* | *Approvers* menu item to access both methods.



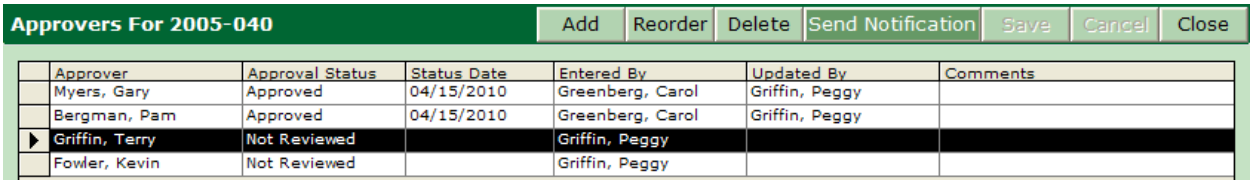
The first method is using the Reorder button in iGreentree which changes the sequence in which the approvers are notified but still requires all approvers to approve the Req. The new order is not saved until the Save button is clicked on the *Approvers For* screen. For example, two managers are identified as Approvers, however, manager 1 is on vacation but waiting for manager 1 to return is not an option, and Requisition approval must move forward. The Recruiter can select to move manager 1 above manager 2 in the approval sequence. Manager 1 can give the final approval upon returning.



Approver	Approval Status	Status Date	Entered By	Updated By	Comments
Myers, Gary	Approved	04/15/2010	Greenberg, Carol	Griffin, Peggy	
Bergman, Pam	Approved	04/15/2010	Greenberg, Carol	Griffin, Peggy	
Griffin, Terry	Not Reviewed		Griffin, Peggy		
Fowler, Kevin	Not Reviewed		Griffin, Peggy		

The second method is using the Send Notification button in iGreentree is a way for the Recruiter to override the originally designated order. For example, two managers are identified as Approvers, however, manager 1 is on vacation but waiting for manager 1 to return is not an option, and Requisition approval must move forward. The Recruiter can select to *Send Notification* to manager 2, who can approve the Req. In Serial mode, this will bypass the need for manager 1 to approve the Req at all.

The *Send Notification* button is also a way to re-send an approval request notification if it was lost or accidentally deleted.



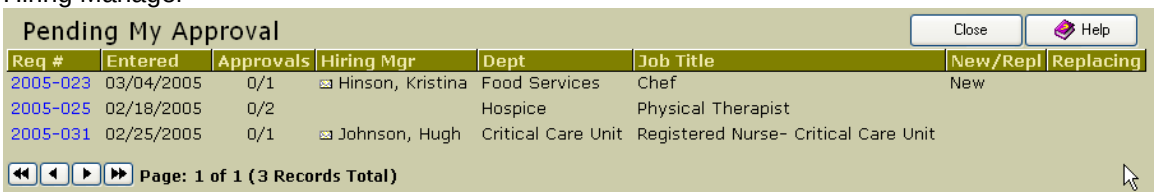
Approver	Approval Status	Status Date	Entered By	Updated By	Comments
Myers, Gary	Approved	04/15/2010	Greenberg, Carol	Griffin, Peggy	
Bergman, Pam	Approved	04/15/2010	Greenberg, Carol	Griffin, Peggy	
Griffin, Terry	Not Reviewed		Griffin, Peggy		
Fowler, Kevin	Not Reviewed		Griffin, Peggy		

Pending My Approval

The Hiring Manager can quickly review Requisitions still pending their approval by choosing *Pending My Approval* from the main Hiring Manager Menu.

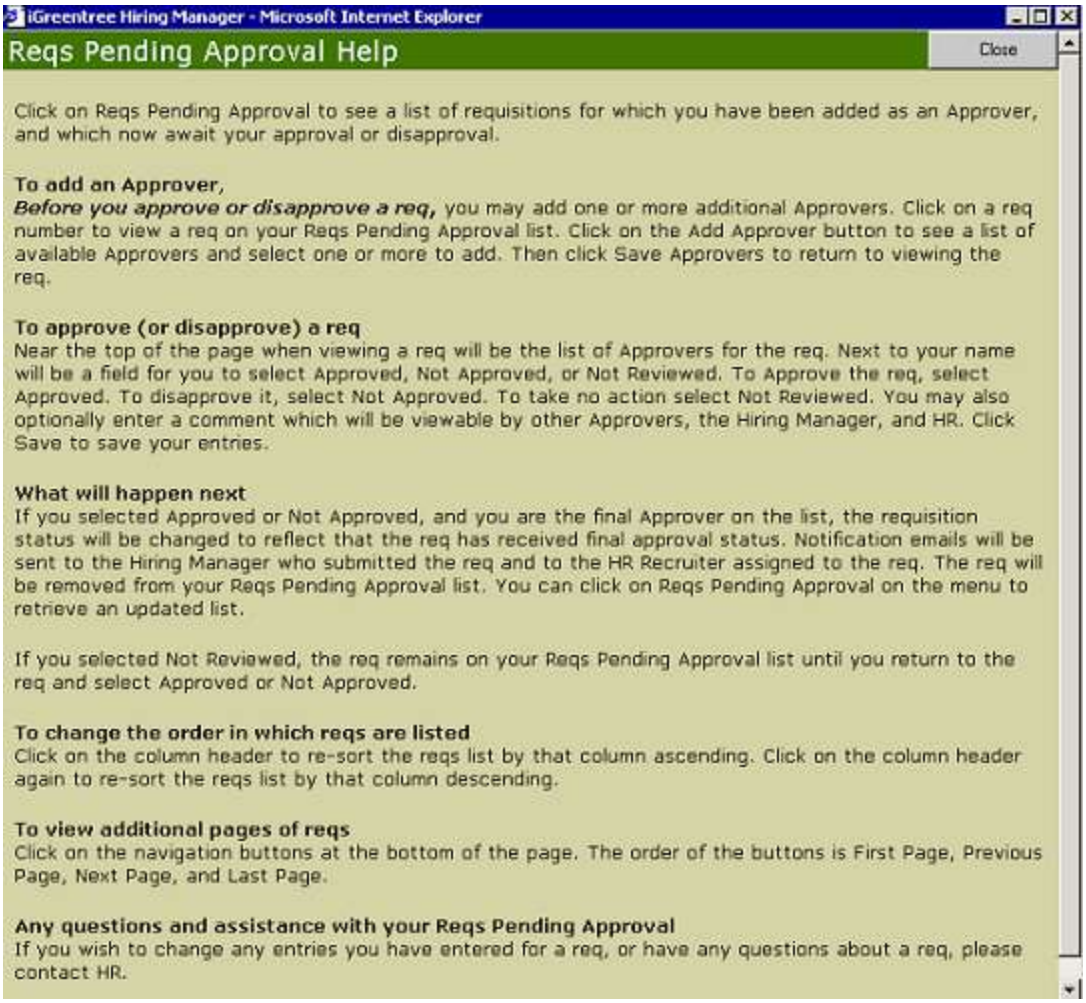


The Requisitions displayed need to be reviewed and approved/disapproved by the currently logged in Hiring Manager



Req #	Entered	Approvals	Hiring Mgr	Dept	Job Title	New/Repl	Replacing
2005-023	03/04/2005	0/1	Hinson, Kristina	Food Services	Chef	New	
2005-025	02/18/2005	0/2		Hospice	Physical Therapist		
2005-031	02/25/2005	0/1	Johnson, Hugh	Critical Care Unit	Registered Nurse- Critical Care Unit		

The *Help* button will display additional information regarding the req approval process.


iGreentree Hiring Manager - Microsoft Internet Explorer
Reqs Pending Approval Help
Close
Click on Reqs Pending Approval to see a list of requisitions for which you have been added as an Approver, and which now await your approval or disapproval.
To add an Approver,
Before you approve or disapprove a req, you may add one or more additional Approvers. Click on a req number to view a req on your Reqs Pending Approval list. Click on the Add Approver button to see a list of available Approvers and select one or more to add. Then click Save Approvers to return to viewing the req.
To approve (or disapprove) a req
Near the top of the page when viewing a req will be the list of Approvers for the req. Next to your name will be a field for you to select Approved, Not Approved, or Not Reviewed. To Approve the req, select Approved. To disapprove it, select Not Approved. To take no action select Not Reviewed. You may also optionally enter a comment which will be viewable by other Approvers, the Hiring Manager, and HR. Click Save to save your entries.
What will happen next
If you selected Approved or Not Approved, and you are the final Approver on the list, the requisition status will be changed to reflect that the req has received final approval status. Notification emails will be sent to the Hiring Manager who submitted the req and to the HR Recruiter assigned to the req. The req will be removed from your Reqs Pending Approval list. You can click on Reqs Pending Approval on the menu to retrieve an updated list.
If you selected Not Reviewed, the req remains on your Reqs Pending Approval list until you return to the req and select Approved or Not Approved.
To change the order in which reqs are listed
Click on the column header to re-sort the reqs list by that column ascending. Click on the column header again to re-sort the reqs list by that column descending.
To view additional pages of reqs
Click on the navigation buttons at the bottom of the page. The order of the buttons is First Page, Previous Page, Next Page, and Last Page.
Any questions and assistance with your Reqs Pending Approval
If you wish to change any entries you have entered for a req, or have any questions about a req, please contact HR.

The Hiring Manager must then select the *Req #* from the list of Requisitions to proceed to the *Review Req* screen where a complete review of the Requisition and a review of designated approvers can be done. This is also the place where the Hiring Manager would define their approval or disapproval of the Requisition along with any comments they would like to make with regards to the Requisition. They will also have the option to *Add Approvers* if additional Approvers are necessary.

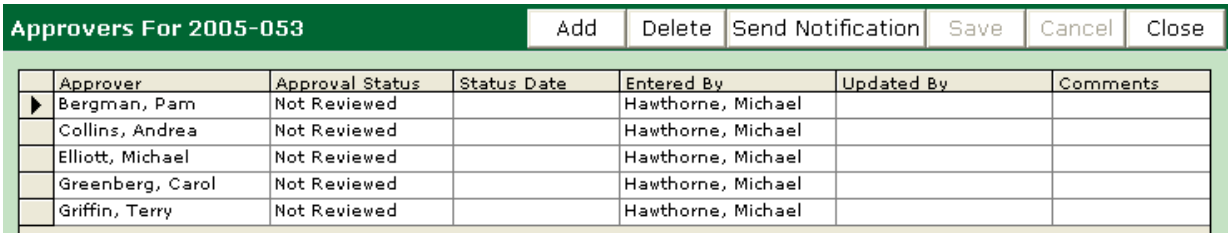


Once the Hiring Manager has selected their *Approval Status,* added *Comments,* and has selected *Save,* a confirmation of the Requisition update will display.



If the *Approval Status* was changed to *Approved* the Hiring Manager will receive a confirmation of the change. The Requisition will also be removed from the Hiring Manager's *Pending My Approval* list.

For designated Approvers who are HR Users of the iGreentree Application, they may either approve or disapprove the Requisition in the Hiring Manager module or in iGreentree. In iGreentree, this is done by bringing the Requisition into *Edit View* and selecting 'Approvers' from the 'Attachments' menu then completing and saving the information.



Approver	Approval Status	Status Date	Entered By	Updated By	Comments
Bergman, Pam	Not Reviewed		Hawthorne, Michael		
Collins, Andrea	Not Reviewed		Hawthorne, Michael		
Elliott, Michael	Not Reviewed		Hawthorne, Michael		
Greenberg, Carol	Not Reviewed		Hawthorne, Michael		
Griffin, Terry	Not Reviewed		Hawthorne, Michael		

Approver Reqs

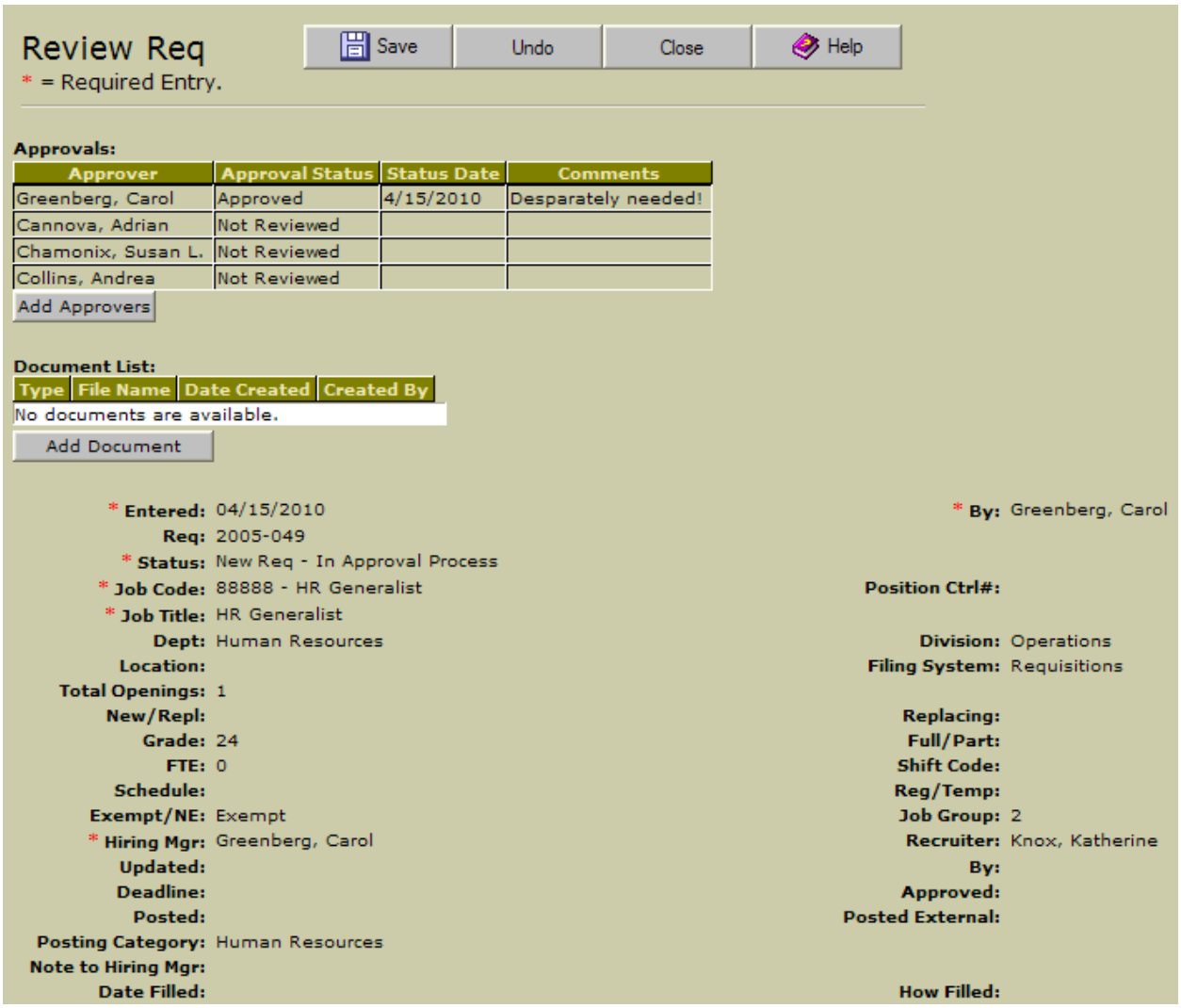
The Hiring Manager also has the option to review only Requisitions for which they are or were designated as an Approver. This screen will not display Requisitions for which they are listed as the Initiator, those Reqs will display under *My Reqs.* To begin select Approver Reqs from the Reqs main menu.



Hiring Managers can select to view a more extensive date range of Requisitions by choosing another option from the *List These Reqs* list. The 'Current' option is defined in *Maintenance* | *Codes* | *ReqStatus* | *IsCurrentForHiringMgr.*


Approver Reqs
Close
Help
Req #
Job Title
Status
Dept
Hiring Mgr
Entered
Recruiter
2005-020 Senior Administrative Assistant New Req - Approved Bergman, Pam 10/21/2005 Fowler, Kevin
2005-038 Chef New Req - In Approval Process Elliott, Michael 12/09/2005 Knox, Katherine
2005-043 HR Generalist New Req - In Approval Process Hawthorne, Michael D 03/02/2010 Knox, Katherine
2005-046 Sales Administrator New Req - In Approval Process Greenberg, Carol 03/11/2010 Knox, Katherine
2005-049 HR Generalist New Req - In Approval Process Greenberg, Carol 04/15/2010 Knox, Katherine
Page: 1 of 1 (5 Records Total)
List These Reqs:
Current
Current
Year to Date
Last 12 Months
All Reqs
iGreentree Hiring Manager
Version: 8.4.4
Copyright © 2000-2010, Greentree Systems, Inc.,
All Rights Reserved.

The Hiring Manager must then select the *Req #* from the list of Requisitions to proceed to the *Review Req* screen where a complete review of the Requisition and a review of designated approvers can be done. They also have the option to *Add Approvers* if additional Approvers are necessary.

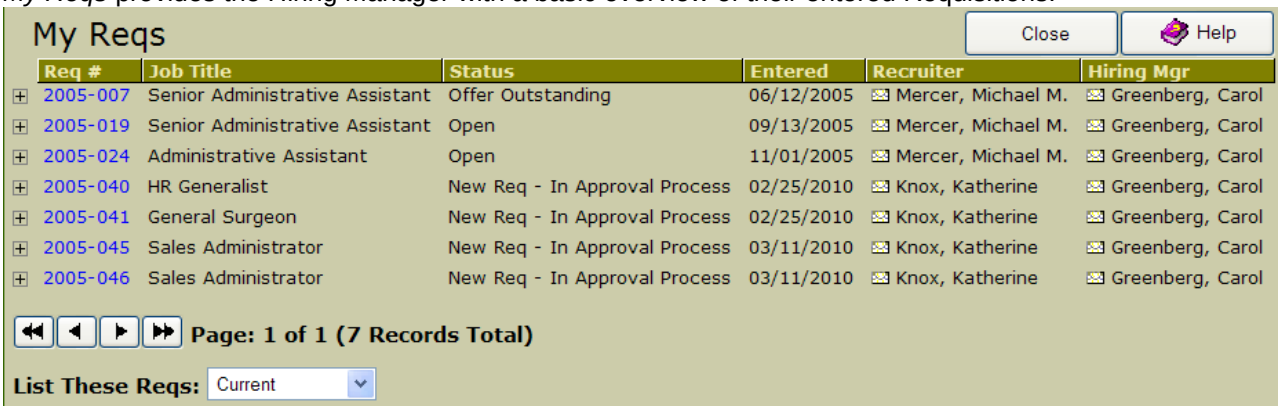


Req and Applicant Review

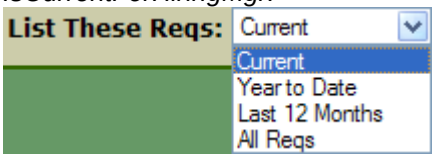
A Hiring Manager can periodically review the status/activity and Applicants of their designated Requisitions through the Hiring Manager module. To review designated Requisitions the Hiring Manager selects *My Reqs* from the *Reqs* main menu.



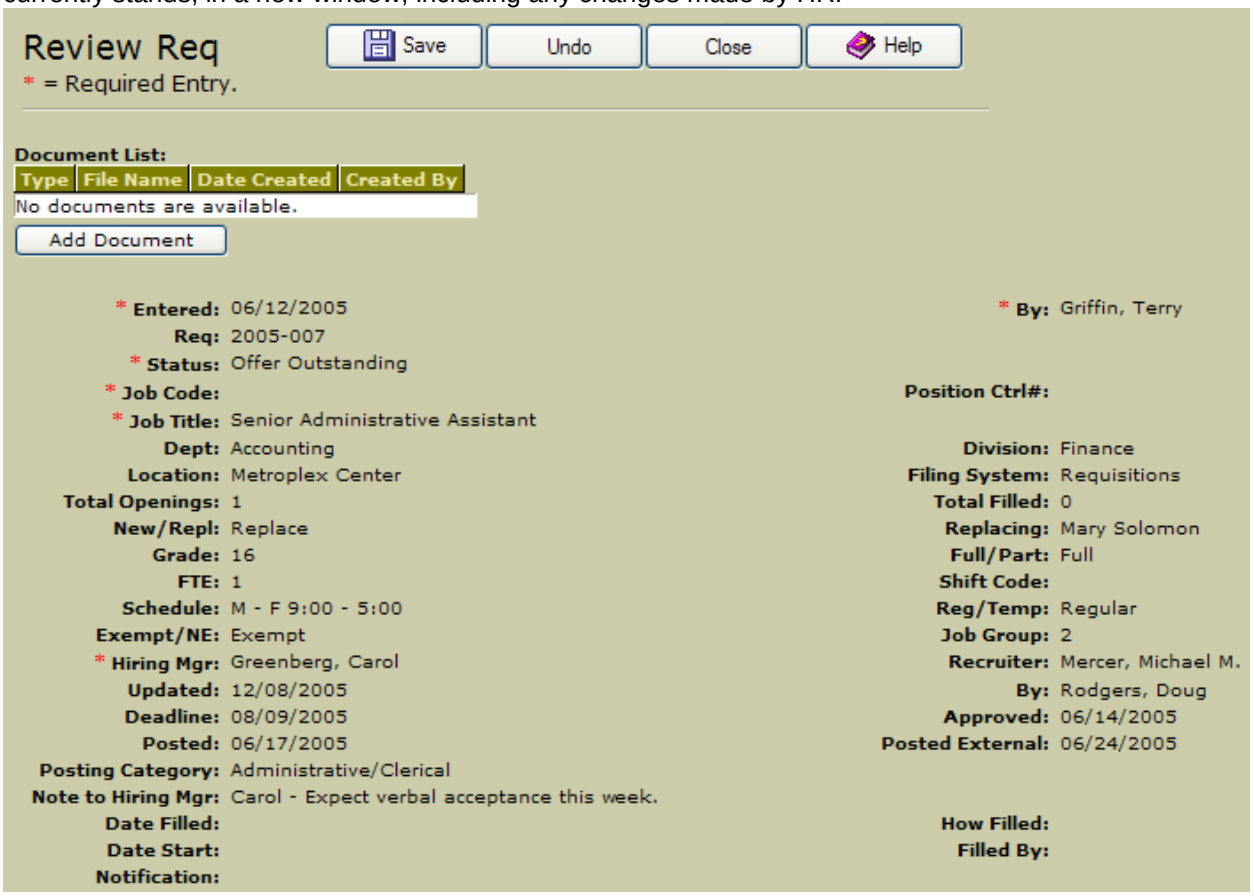
My Reqs provides the Hiring Manager with a basic overview of their entered Requisitions.


My Reqs
Close
Help
Req # | Job Title | Status | Entered | Recruiter | Hiring Mgr
2005-007 | Senior Administrative Assistant | Offer Outstanding | 06/12/2005 | Mercer, Michael M. | Greenberg, Carol
2005-019 | Senior Administrative Assistant | Open | 09/13/2005 | Mercer, Michael M. | Greenberg, Carol
2005-024 | Administrative Assistant | Open | 11/01/2005 | Mercer, Michael M. | Greenberg, Carol
2005-040 | HR Generalist | New Req - In Approval Process | 02/25/2010 | Knox, Katherine | Greenberg, Carol
2005-041 | General Surgeon | New Req - In Approval Process | 02/25/2010 | Knox, Katherine | Greenberg, Carol
2005-045 | Sales Administrator | New Req - In Approval Process | 03/11/2010 | Knox, Katherine | Greenberg, Carol
2005-046 | Sales Administrator | New Req - In Approval Process | 03/11/2010 | Knox, Katherine | Greenberg, Carol
Page: 1 of 1 (7 Records Total)
List These Reqs: Current

Hiring Managers can select to view a more extensive date range of Requisitions by choosing another option from the *List These Reqs* list. The 'Current' option is defined in *Maintenance* | *Codes* | *ReqStatus* | *IsCurrentForHiringMgr.*

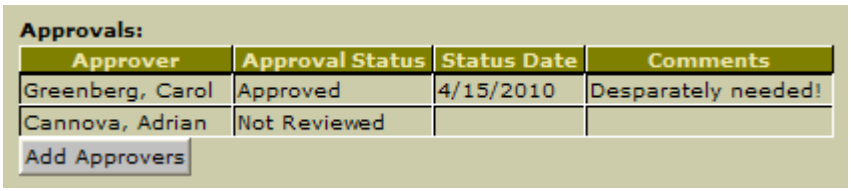


For a more detailed review of the Requisition, the Hiring Manager can select the desired Requisition from the list by clicking on the *Req #.* The *Review Req* form reflects all field values as the Requisition currently stands, in a new window, including any changes made by HR.

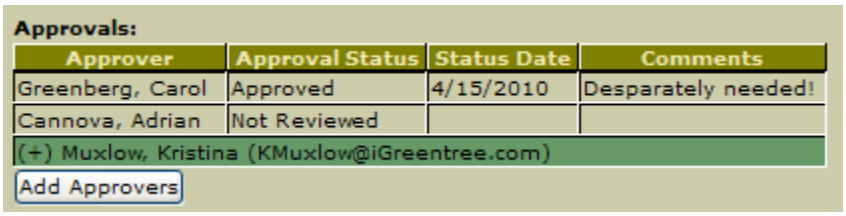


Review Req will also have the latest information about the approval process. Approvers can be added provided the Req has not completed the approval process. If the approval process is complete and additional Approvers need to be added then the Hiring Manager will need to contact the Recruiter to add them via the iGreentree Application.

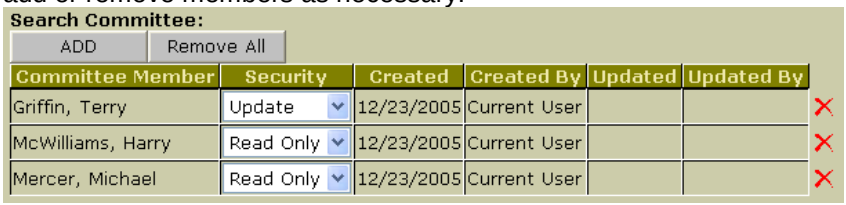
If the Req has not completed the approval process an Approver can be added from any of the *Review Req* screens in the Hiring Manager module by clicking on Add Approvers.



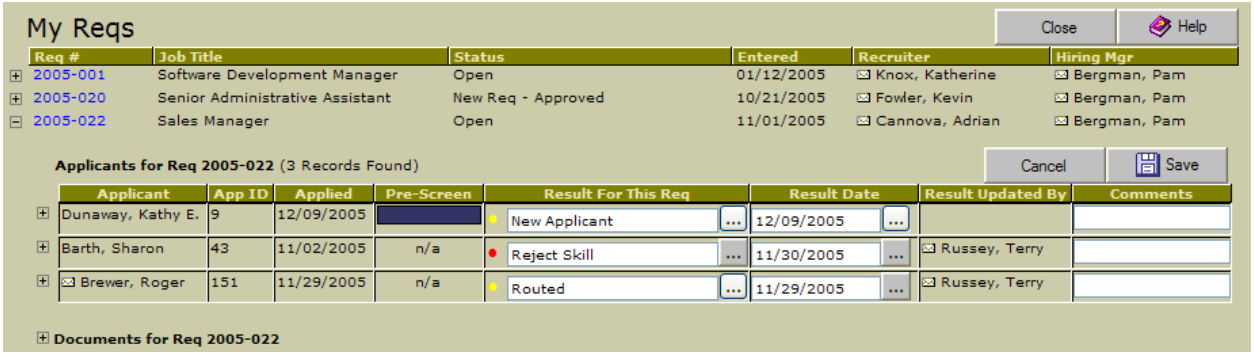
Newly added Approvers have a (+) in front of their names until the changes to the Req are saved by clicking on the Save button at the top of the *Review Req* screen. Approvers can only be removed by a HR User via the iGreentree Application.



Search Committee Members may also be maintained through the Review Req screen. The initiator can add or remove members as necessary.



It is also the *My Reqs* screen from which a Hiring Manager can review Applicants who have been logged to one of their Requisitions. By selecting the ⊞ button next to a Requisition, the Hiring Manager is able to view Applicants for that Req. They also see a pre-screen question rating if the Applicant applied to the Requisition via Candidate Self-Service (CSS).



For each Applicant logged to the Req and viewable by the Hiring Manager (as defined by their assigned *Result For This Req* column value) the Hiring Manager is able to review all designated and available documents. To view a document, the Hiring Manager expands the Applicant information by clicking on the ⊞ next to the Applicant's name. Then they click on the ⊞ next to *Documents for* the Applicant to expand the list of documents available. Clicking on the icon next to the document type displays the selected document. When viewing a document, they have the option to print if that is preferable to viewing online.

Documents can be added by clicking on the Add Document button. This allows a User to add documents such as interview notes, references, etc. making it accessible to others involved in the interview and selection process.

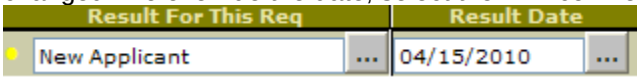

My Reqs
Close
Help
Req # | Job Title | Status | Entered | Recruiter | Hiring Mgr
2009-001 | Software Development Manager | Open | 01/14/2009 | Knox, Katherine | Bergman, Pam
2009-020 | Senior Administrative Assistant | New Req - Approved | 10/23/2009 | Fowler, Kevin | Bergman, Pam
2009-022 | Sales Manager | Open | 11/03/2009 | Cannova, Adrian | Bergman, Pam
Applicants for Req 2009-022 (3 Records Found)
Cancel
Save
Applicant | App ID | Applied | Pre-Screen | Result For This Req | Result Date | Result Updated By | Comments
Dunaway, Kathy E. | 9 | 12/11/2009 | New Applicant | 12/11/2009
Documents for Kathy E. Dunaway
Type | File Name | Date Created | Created By
CSSForm | CSSInt{D62AB1E2-AA9F-448C-AC06-66FEA9862BE7}.HTM | 12/11/2009 | Kathy E. Dunaway
[document added] Dunaway_Kathy Interview Notes.doc
Add Document

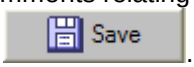
Individual documents can be deleted and/or replaced by clicking the button to the right of the specific document. An updated version of the document can then be added.

The Hiring Manager is also able to view an Applicant's historical information specifically relating to other Requisitions to which they have been logged.


Applicants for Req 2005-022 (3 Records Found)
Cancel
Save
Applicant | App ID | Applied | Pre-Screen | Result For This Req | Result Date | Result Updated By | Comments
Dunaway, Kathy E. | 9 | 12/09/2005 | New Applicant | 12/09/2005
Documents for Kathy E. Dunaway
Type | File Name | Date Created | Created By
CSSForm | CSSInt{D62AB1E2-AA9F-448C-AC06-66FEA9862BE7}.HTM | 12/09/2005 | Kathy E. Dunaway
Add Document
Other Reqs Applied for by Kathy E. Dunaway
Show All
Show Mine
Req # | Job Title | Applied | Pre-Screen | Result For This Req | Result Date | Result Updated By | Comments
No Records Found.

After reviewing an Applicant's information, the Hiring Manager should define the *Result For This Req*. The *Result Date* automatically changes to the current date when the corresponding *Result for this Req* is changed. To override the date, select the ... icon next to the *Result Date* field.



The *Result For This Req* selections are defined in *Maintenance* | *Codes* | *Result.* See **Codes Maintenance** for more information. Additionally, any pertinent comments relating to their *Result* selection should be stated in the comments section. When finished, select 

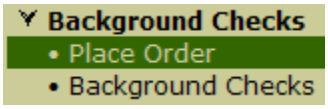
.

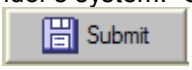
Background Checks in Hiring Manager Module

Your system may be configured so that Hiring Managers have the ability to order a background check on an individual and check the status of that order from the Background Checks main menu. The background check vendors are maintained in iGreentree under *Maintenance* | *Codes* | *BackgroundCheckVendors*.

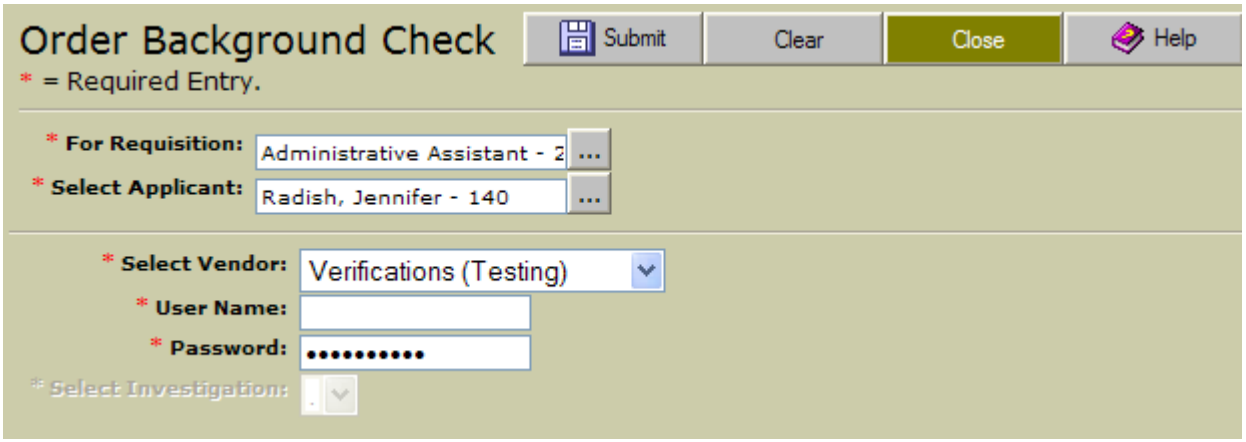
Ordering a Background Check

To place a background check order with your background check vendor, the Hiring Manager must click on *Place Order* from the *Background Checks* main menu.



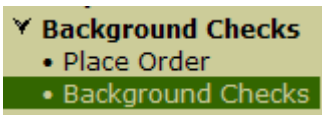
This will bring up the *Order Background Check* form. Once the Requisition, Applicant, Vendor and vendor login information are entered, the Hiring Manager is logged into the vendor's system. Once logged in, the Hiring Manager can select an investigation product and click on 

to place the order. An on-line order confirmation message will be received.



Checking the Status of a Background Check

To check the status of background check orders via the Hiring Manager module, the Hiring Manager must click on *Background Checks* from the *Background Checks* main menu.



This will bring up the *Background Checks* form which displays background check activity for Applicants on your Requisitions. Click on the icon in the *Last Updated* column to view the latest order status information from the background vendor. Click on the icon in the *Completed* column to view the completed report.


Background Checks
Close
Help
Req # | Job Title | Applicant | Request Type | Status | Completed | Last Updated | Ordered | Ordered By | Investigation | Order Ref Id
No Records
No Records Found.
List These Reqs: Current

Offers in Hiring Manager Module

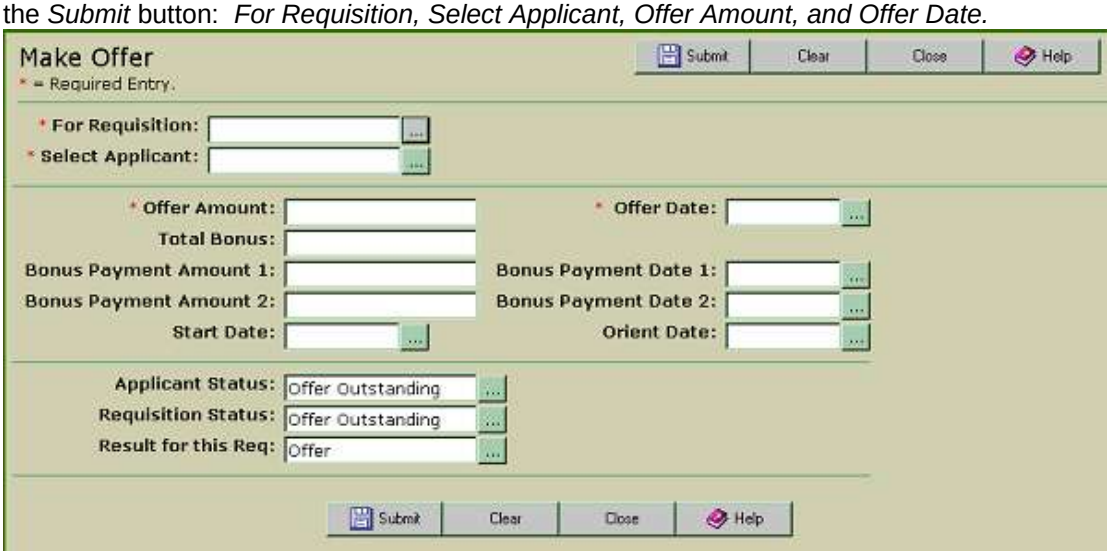
Hiring Managers also have the ability to extend an offer to an Applicant and hire an Applicant to a Requisition with minimal involvement by the assigned Recruiter. Depending on the organization, 'extending an offer' can mean one of two things. 'Extending an offer' can be a way to record in the database that an actual offer has been made along with the details of that offer. It can also be a means to send a notification to a Recruiter that an offer needs to be extended. An organization decides which method should be used and Greentree Systems configures the system appropriately.

Extending Offers

To extend an offer via the Hiring Manager module, the Hiring Manager must click on *Make Offer* from the *Offers* main menu.

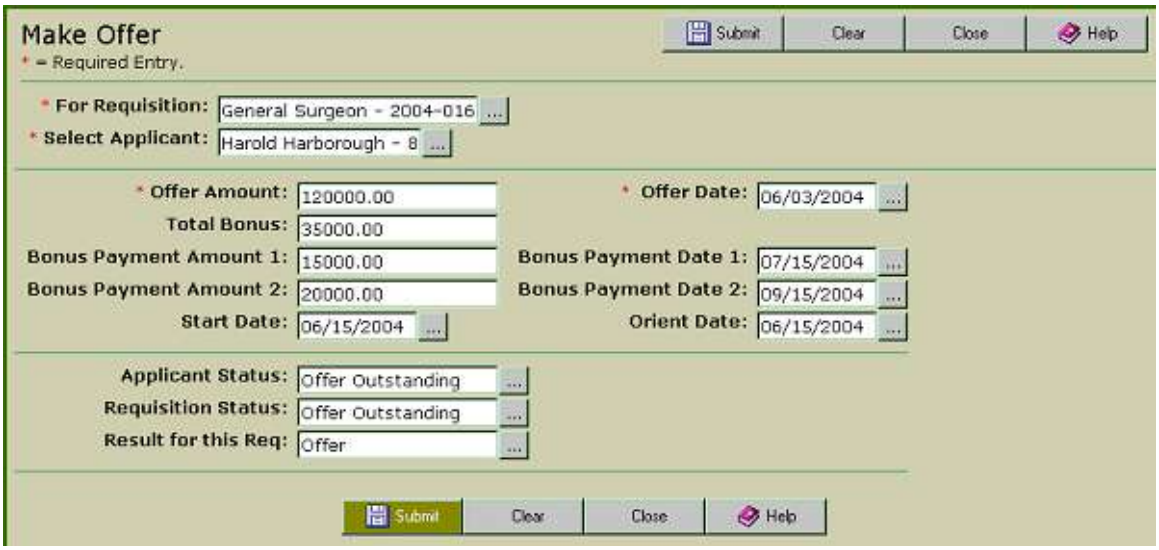


This will bring up the *Make Offer* form. The following fields are required to be populated prior to selecting the *Submit* button: *For Requisition, Select Applicant, Offer Amount, and Offer Date.*

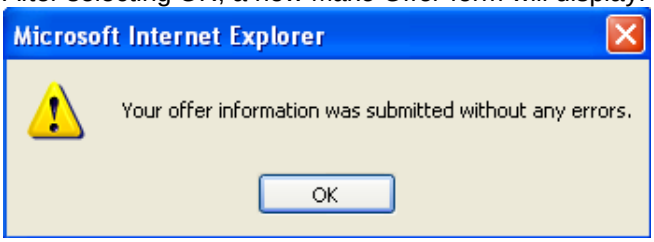


The selection list for the *For Requisition* field will only consist of Requisitions that display on the *My Reqs* list that are considered to be active for recruiting and have Applicants logged to them. The selection list for the *Select Applicant* field will only consist of Applicants who are logged to the selected Requisition. Dollar fields should not have '$' or ',' (commas) entered. The default values for *Applicant Status, Requisition Status,* and *Result for this Req* fields are set in iGreentree under the *Maintenance | HiringMgr Settings.* See **Hiring Manager Module Maintenance** for more information. Once the form is completed, the Hiring Manager must click the 

button to update the Requisition and Applicant records in iGreentree.



Once the offer has been successfully submitted, the Hiring Manager will receive a confirmation message. After selecting *OK*, a new M*ake Offer* form will display.



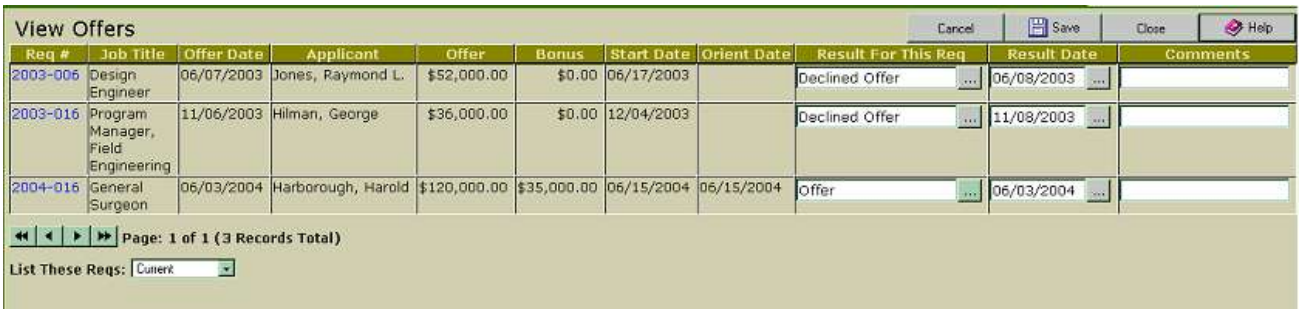
NOTE: When an offer is made via the Hiring Manager module, an email will be sent to the Recruiter by the system. The email to be sent to the Recruiter is set in iGreentree under *Maintenance* | *HiringMgr Settings* | *Msg to Recruiter.* For more information see **Hiring Manager Module Maintenance** and **Letters Maintenance**.

Reviewing Offers

To view basic information for all outstanding offers for the Hiring Manager, they must select *View Offers* from the *Offers* main menu.



The Hiring Manager will be able to update an Applicant's *Result For This Req, Result Date,* and *Comments.* The aforementioned information should be completed on this form if an Applicant declines an offer. If an Applicant accepts an extended offer, the Hiring Manager should go to the *Hire* form of the module. See **Hiring Applicants** for more information.

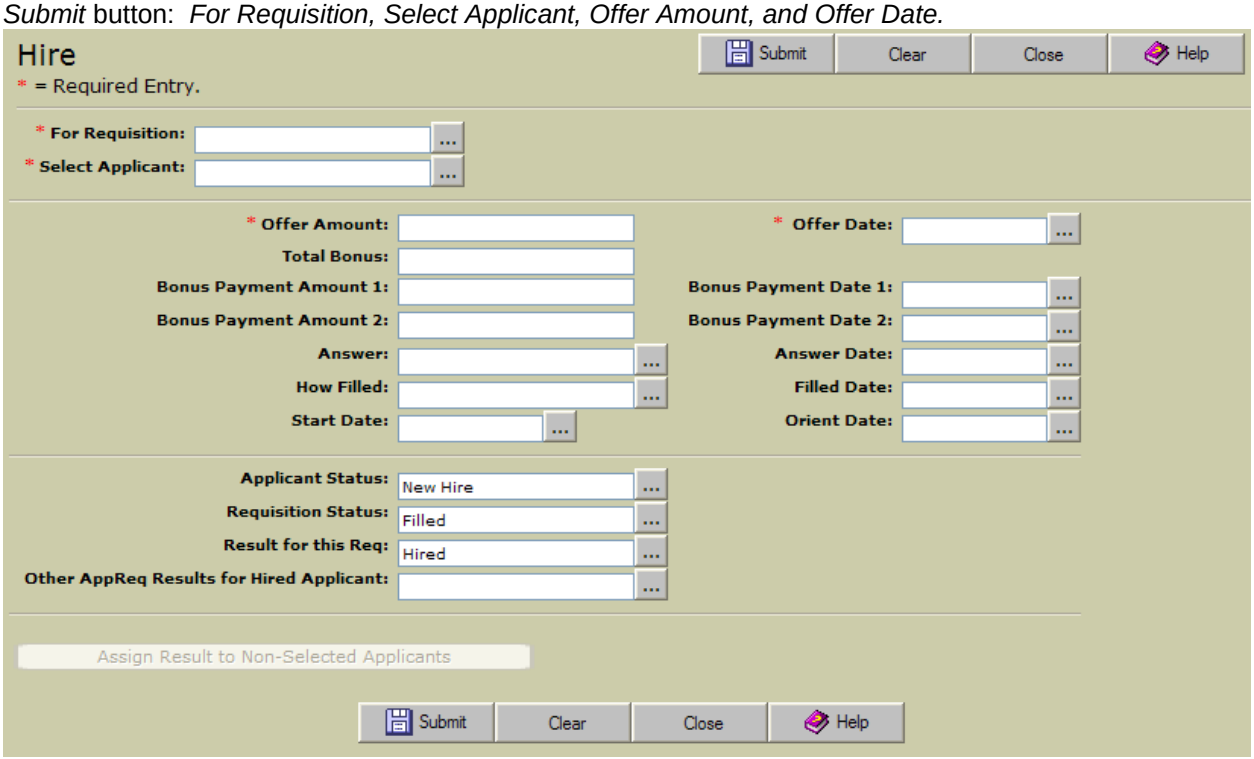

View Offers
Cancel
Save
Close
Help
Req # | Job Title | Offer Date | Applicant | Offer | Bonus | Start Date | Orient Date | Result For This Req | Result Date | Comments
2003-006 | Design Engineer | 06/07/2003 | Jones, Raymond L. | $52,000.00 | $0.00 | 06/17/2003 | | Declined Offer | 06/08/2003
2003-016 | Program Manager, Field Engineering | 11/06/2003 | Hilman, George | $36,000.00 | $0.00 | 12/04/2003 | | Declined Offer | 11/08/2003
2004-016 | General Surgeon | 06/03/2004 | Harborough, Harold | $120,000.00 | $35,000.00 | 06/15/2004 | 06/15/2004 | Offer | 06/03/2004
Page: 1 of 1 (3 Records Total)
List These Reqs: Current

Hiring Applicants

To hire an Applicant via the Hiring Manager Module, the Hiring Manager must click on *Hire* from the *Offers* main menu.

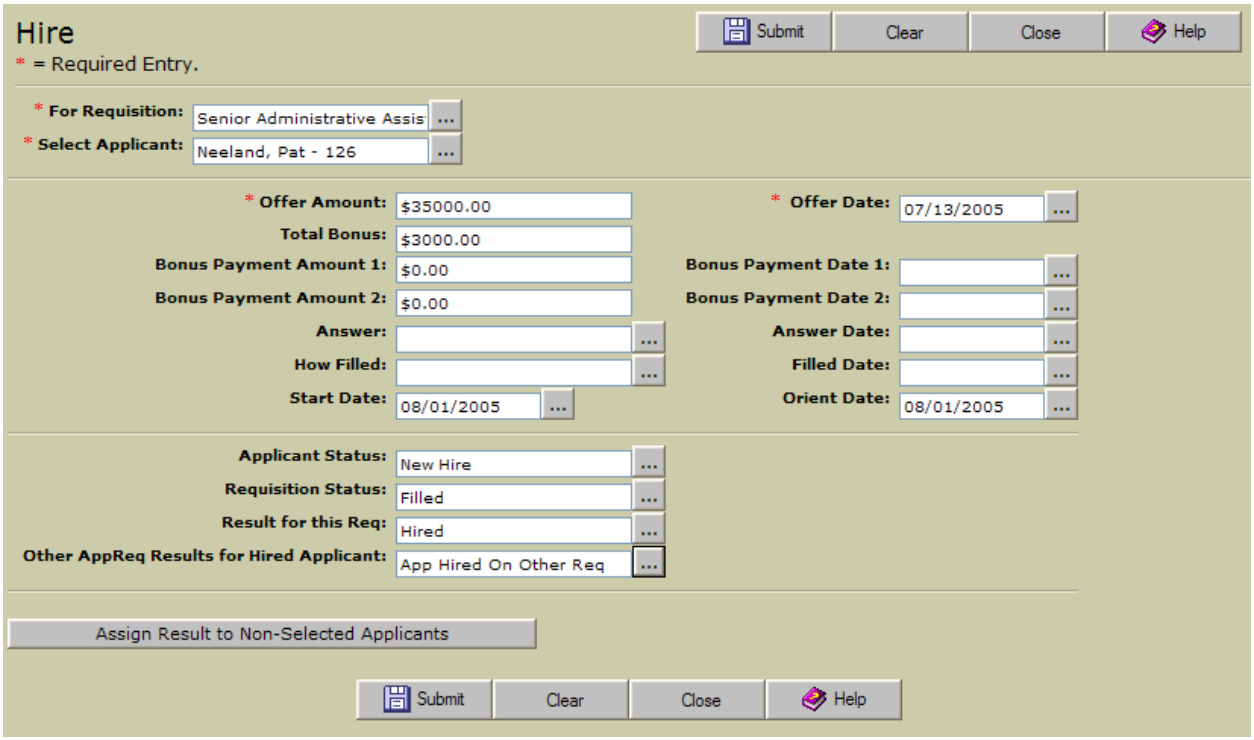


This will bring up the *Hire* form. The following fields are required to be populated prior to selecting the *Submit* button: *For Requisition, Select Applicant, Offer Amount, and Offer Date.*

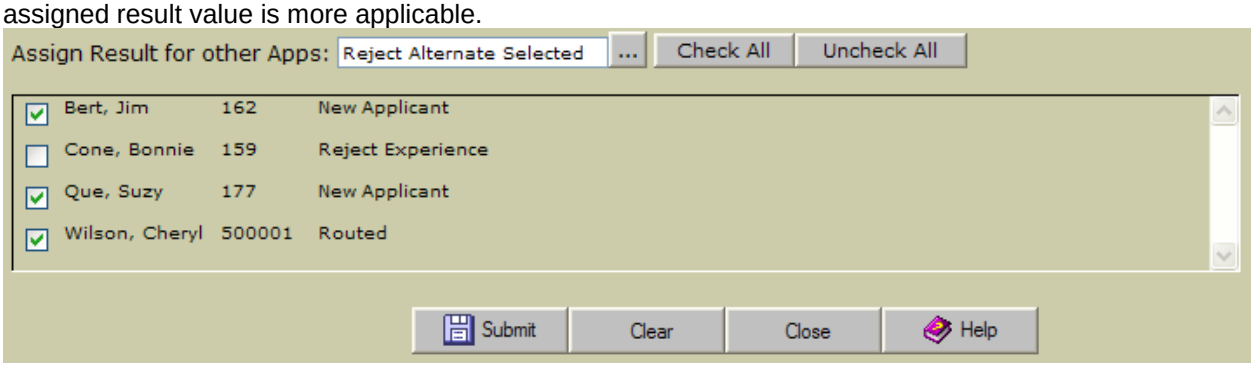


The selection list for the *For Requisition* field will only consist of Requisitions that display on the *My Reqs* list that are considered to be active for recruiting and have Applicants logged to them. The selection list for the *Select Applicant* field will only consist of Applicants who are logged to the selected Requisition. Dollar fields should not have '$' or ',' (commas) entered. The default values for *Applicant Status, Requisition Status,* and *Result for this Req* fields are set in iGreentree under *Maintenance | HiringMgr Settings.* See **Hiring Manager Module Maintenance** for more information. Once the form is completed, the Hiring Manager must select *Submit* to update the Requisition and Applicant records in iGreentree.

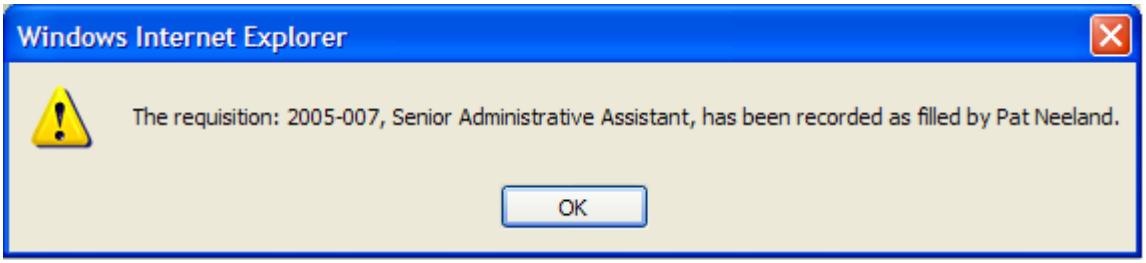
When a Hiring Manager selects a *For Requisition* and *Select Applicant* combination that has had an offer previously extended, the module will auto-populate all fields on the *Hire* form that have information available. The remaining fields should be completed once the Applicant has confirmed their acceptance of the offer.



To ensure that all Applicants are assigned a final result with regards to their bid for a Requisition, the *Assign Result to Non-Selected Applicants* should be clicked. The selected *Assign Result for other Apps* value will be the given result for all Applicants logged to the selected Requisition who have a checkmark next to their name. If a result value is displaying for an Applicant in the list, careful consideration should be taken to determine if the Applicant should be assigned the new result value, or if the previously assigned result value is more applicable.



Once the hire has been successfully submitted, the Hiring Manager will receive a confirmation message. After selecting *OK*, a new *Hire* form will display. The hired Applicant will no longer display on the *View Offers* form.


Windows Internet Explorer
The requisition: 2005-007, Senior Administrative Assistant, has been recorded as filled by Pat Neeland.
OK

NOTE: A LETTER IS NOT AUTOMATICALLY GENERATED FROM THE SYSTEM TO THE RECRUITER ON FILE OR THE APPLICANT WHEN THE HIRE ACTION HAS BEEN COMPLETED.

Finding Applicants in Hiring Manager Module

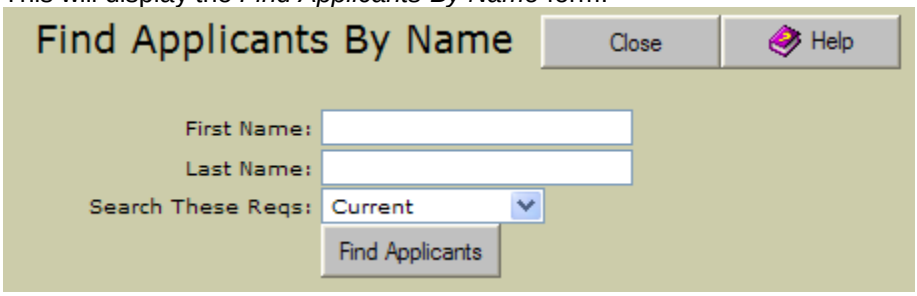
Hiring Managers also have the ability to find qualified Applicants by name or who have recently applied (either by CSS or manually in iGreentree) to one of their Requisitions.

Finding By Name

To find an Applicant by name in the Hiring Manager module, the Hiring Manager must click on *Find By Name* from the *Applicants* main menu.



This will display the *Find Applicants By Name* form.



Full name information can be entered before selecting *Find Applicants*. However, if an Applicant's full name is not known, the Hiring Manager can perform a partial name search.

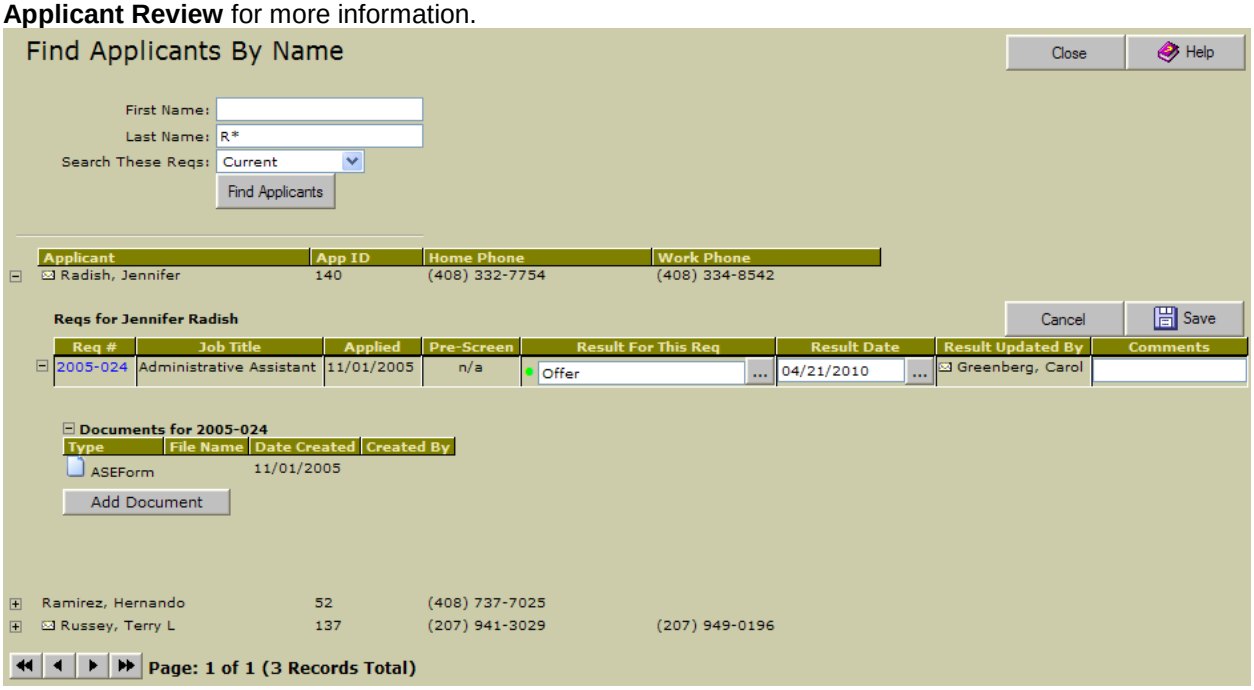


Or they can enter as much information as desired followed by an asterisk '*'.


Find Applicants By Name
Close
Help
First Name:
Last Name: R*
Search These Reqs: Current
Find Applicants
Applicant App ID Home Phone Work Phone
Radish, Jennifer 140 (408) 332-7754 (408) 334-8542
Ramirez, Hernando 52 (408) 737-7025
Russey, Terry L 137 (207) 941-3029 (207) 949-0196
Page: 1 of 1 (3 Records Total)

NOTE: Name searching is not case-sensitive.

In addition to viewing an Applicant's phone information, the Hiring Manager is able to view the Requisition information and Applicant documents, much like they are able to from the *My Reqs* menu. See **Req and Applicant Review** for more information.


Find Applicants By Name
Close
Help
First Name:
Last Name: R*
Search These Reqs: Current
Find Applicants
Applicant App ID Home Phone Work Phone
Radish, Jennifer 140 (408) 332-7754 (408) 334-8542
Reqs for Jennifer Radish
Cancel
Save
Req # Job Title Applied Pre-Screen Result For This Req Result Date Result Updated By Comments
2005-024 Administrative Assistant 11/01/2005 n/a Offer 04/21/2010 Greenberg, Carol
Documents for 2005-024
Type File Name Date Created Created By
ASEForm 11/01/2005
Add Document
Ramirez, Hernando 52 (408) 737-7025
Russey, Terry L 137 (207) 941-3029 (207) 949-0196
Page: 1 of 1 (3 Records Total)

The Hiring Manager also has the ability to add documents to the Applicant's Application such as interview notes.

Finding New Applicants Only

To quickly view only newly logged Applicants to their positions, the Hiring Manager can click on *New Applicants* from the *Applicants* main menu.



When a Hiring Manager selects to view their *New Applicants*, there is a pre-defined query that will run based on the iGreentree system's definition of a new Applicant. *New Applicants* are defined in iGreentree under *Maintenance* | *Codes* | *Result* | *IsNewApplicant.* See **Codes Maintenance** for more information.



Changing your Password

The Hiring Manager can change their password anytime by selecting *Change Password* from the *Maintenance* main menu. The password guidelines for length, complexity and re-use are controlled in iGreentree under *Maintenance* | *System Settings*. The standard password guideline is a minimum length of 6 characters, alpha or numeric or a combination including some symbols.

Logging Off

When finished adding, approving, and reviewing Requisitions the Hiring Manager can select *Logoff* from the *Logoff* main menu.



Requisition Management - iGreentree

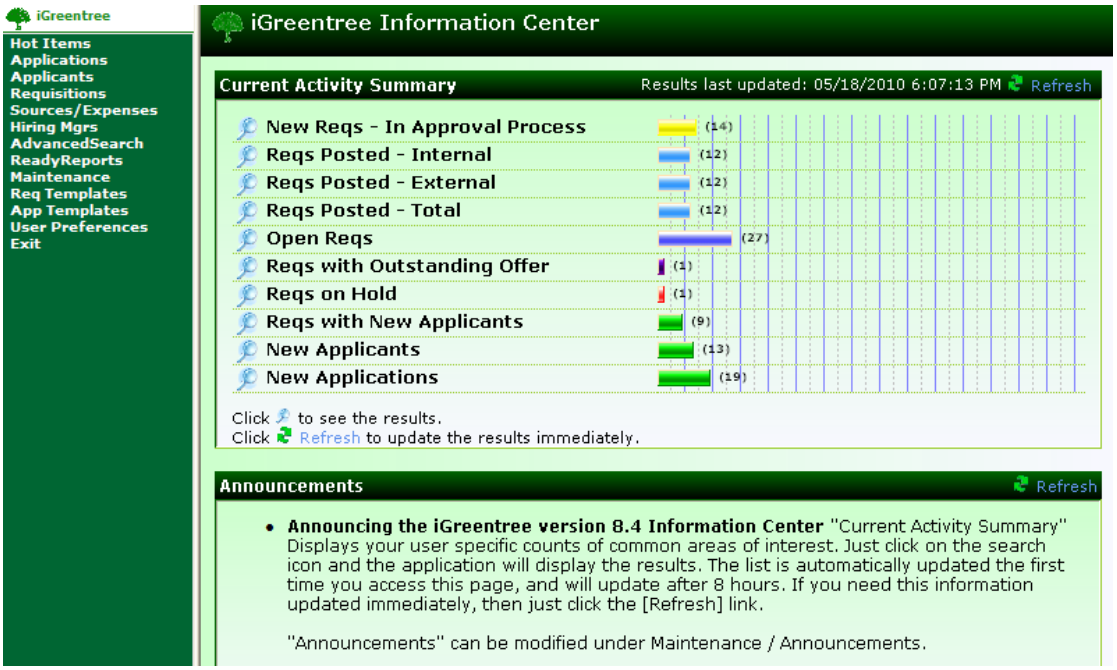
Objectives

This chapter is for anyone who will enter Requisition data directly into iGreentree, or who wishes to become better acquainted with the fields on the Requisition base record and the use of those fields. After completing this chapter, the User will be able to:

- Enter new Requisitions via iGreentree
- Be familiar with how each Req field is used
- Use Templates to decrease data entry and improve consistency
- Find Requisitions that were entered
- Find new or specific Applications

iGreentree Information Center (Dashboard)

The *iGreentree Information Center*, often referred to as the *Dashboard*, is usually the first screen that appears when a User logs into the iGreentree module. It consists of two sections, the *Current Activity Summary* section and the *Announcements* section.


iGreentree
Hot Items
Applications
Applicants
Requisitions
Sources/Expenses
Hiring Mgrs
AdvancedSearch
ReadyReports
Maintenance
Req Templates
App Templates
User Preferences
Exit
iGreentree Information Center
Current Activity Summary
Results last updated: 05/18/2010 6:07:13 PM
Refresh
New Reqs - In Approval Process (14)
Reqs Posted - Internal (12)
Reqs Posted - External (12)
Reqs Posted - Total (12)
Open Reqs (27)
Reqs with Outstanding Offer (1)
Reqs on Hold (1)
Reqs with New Applicants (9)
New Applicants (13)
New Applications (19)
Click to see the results.
Click Refresh to update the results immediately.
Announcements
Refresh
Announcing the iGreentree version 8.4 Information Center "Current Activity Summary" Displays your user specific counts of common areas of interest. Just click on the search icon and the application will display the results. The list is automatically updated the first time you access this page, and will update after 8 hours. If you need this information updated immediately, then just click the [Refresh] link.
"Announcements" can be modified under Maintenance / Announcements.

If a User has a Hot Item search set to run at startup, then the Dashboard is hidden behind the results of the Hot Item search window. The Dashboard can always be displayed by closing any windows using the Close button at the upper right corner of the screen.

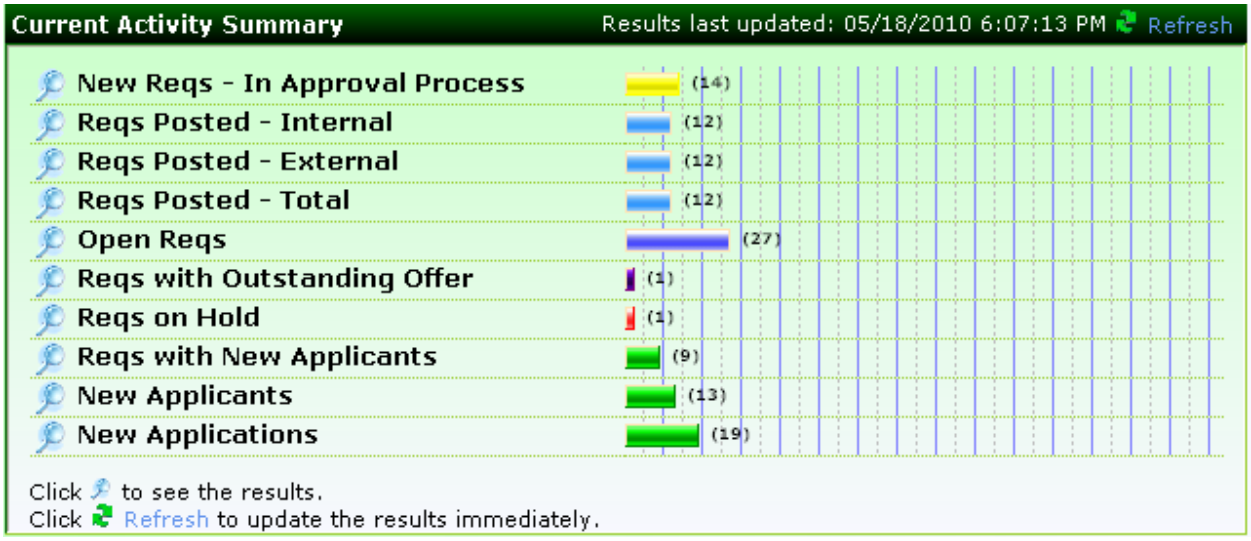
Current Activity Summary

The *Current Activity Summary* section provides an easy way for Recruiters to see and have one-click access to their current activities. The standard Dashboard items for Recruiters reflect Applicants and Requisitions that are 'owned' by the Recruiter based on their entry in the Recruiter field on the Requisition. The standard Dashboard items for iGreentree Administrators reflect all activity.

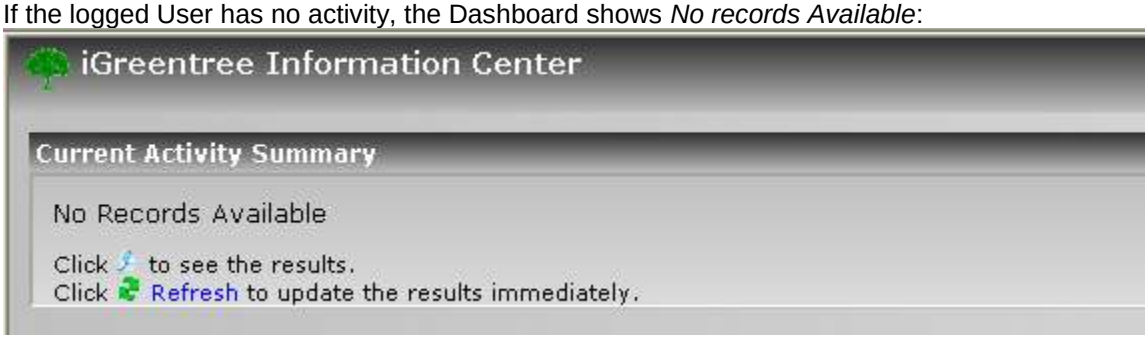
Each item in the Dashboard is a quick link to a specific search. The number to the right of the colored bar indicates the number of items associated with that information. For example, the first item entitled *New Reqs – In Approval Process* has 14 items. This means there are 14 new Requisitions currently in the approval process.

The User can click on the icon to quickly view the details of this information. A *QuickSearch* is performed to retrieve the information and is then displayed in *List View* format. If only one result is available it will be displayed in *Summary View* or *Edit View* format depending on the preferences setting for the User.

The *Dashboard* information is retrieved when the User first logs in and can be refreshed manually by clicking on Refresh.

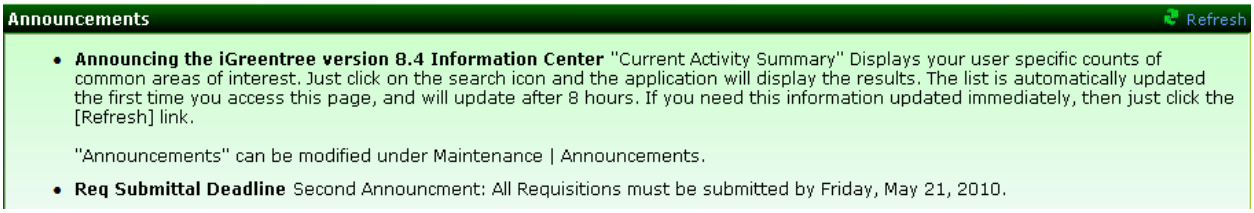

Current Activity Summary
Results last updated: 05/18/2010 6:07:13 PM
Refresh
New Reqs - In Approval Process (14)
Reqs Posted - Internal (12)
Reqs Posted - External (12)
Reqs Posted - Total (12)
Open Reqs (27)
Reqs with Outstanding Offer (1)
Reqs on Hold (1)
Reqs with New Applicants (9)
New Applicants (13)
New Applications (19)
Click to see the results.
Click Refresh to update the results immediately.

If the logged User has no activity, the Dashboard shows *No records Available*:


iGreentree Information Center
Current Activity Summary
No Records Available
Click to see the results.
Click Refresh to update the results immediately.

Announcements

The Announcements section of the Information Center provides an easy way to display information to all Users when they log into the iGreentree module. Each Announcement appears as a bulleted item with the title in bold followed by the text.


Announcements
Refresh
Announcing the iGreentree version 8.4 Information Center "Current Activity Summary" Displays your user specific counts of common areas of interest. Just click on the search icon and the application will display the results. The list is automatically updated the first time you access this page, and will update after 8 hours. If you need this information updated immediately, then just click the [Refresh] link.
"Announcements" can be modified under Maintenance | Announcements.
Req Submittal Deadline Second Announcment: All Requisitions must be submitted by Friday, May 21, 2010.

The ability to add, delete and edit Announcements is available by going to *Maintenance* | *Announcements*. This is also where the order in which they are displayed and a time period during which they are displayed can be specified.

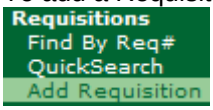
Requisitions in iGreentree

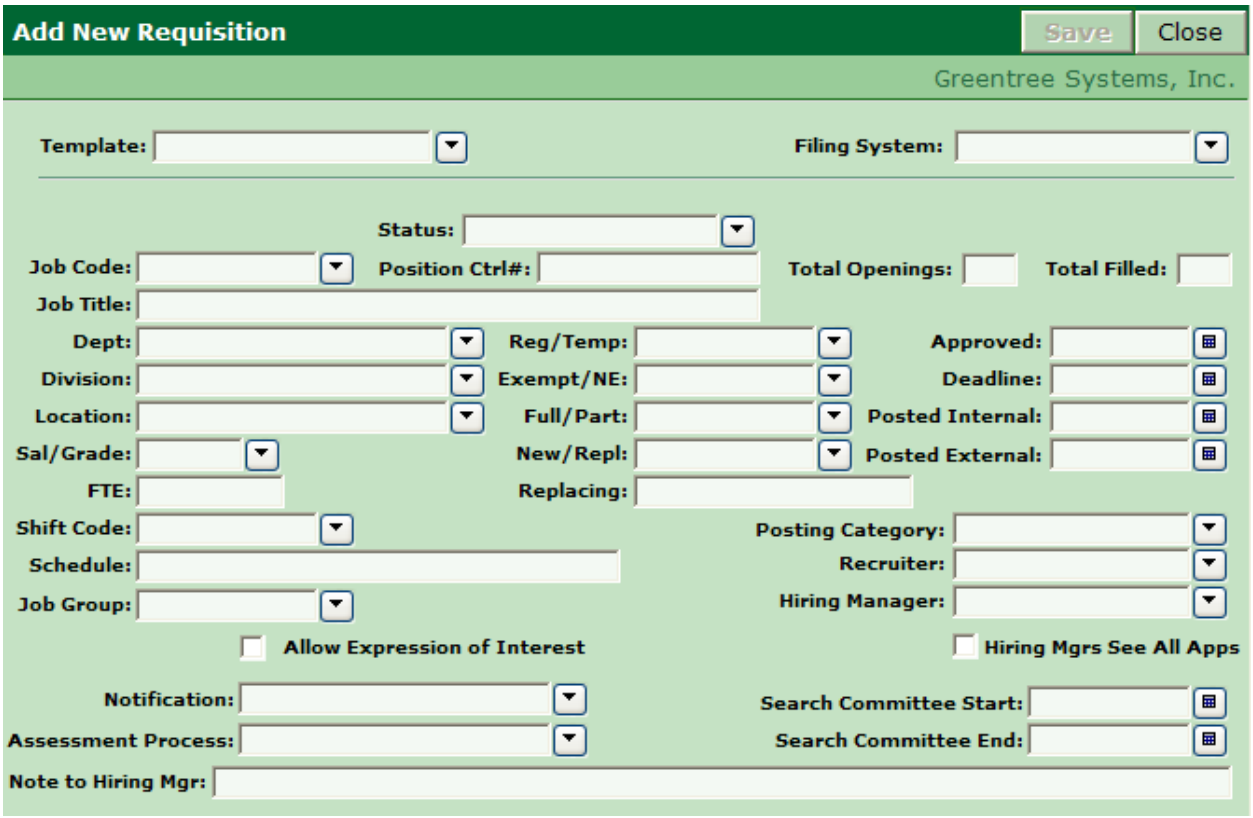
Whether or not the Hiring Manager module is used, the Recruiting department will want to track and maintain the Req data, and there may be some information that is not entered by managers, such as approval and posting dates, and the current Status of the Req.

If your organization does not have the Hiring Manager module, the Recruiting department will enter all of the Req information directly into iGreentree.

Regardless of who enters the data, everyone in the Recruiting department should become aware of the information stored for Reqs and how to use it.

To add a Requisition, select the *Add Requisition* from the *Requisitions* menu.





Manually Entering Requisition Data

There are many pieces of information that may be tracked for Requisitions. It is recommended that Users enter information into the fields so that the Requisition is as complete as possible.

Template

Templates can be used to save time during data entry and to keep data consistent when several Reqs need the same data in one or more fields. Templates will be discussed later in this chapter.



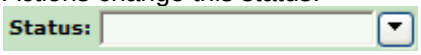
Filing System

This field determines how the Req will be numbered. Some systems may have a single Filing System, such as *Requisitions* or several Filing Systems with different numbering formats for special groups of Reqs*. Filing System is a required field. If left blank, the system will not allow the Requisition to be saved.*



Requisition Status

The Status field, often referred to as the *Req Status*, is very important since it shows the Req's current state in the process. *Status codes are often used to drive which records are posted to iGreentree's Candidate Self-Service Module (CSS).* It is also used for searching and reporting. Several Requisition Actions change this status.



This field also determines if a job appears as a *Hot Job* on the CSS web site. A Hot Job is used to designate a hard to fill or very urgently needed position. On the CSS web site, a Hot Job appears with a  icon just to the right of the Job Title to catch an applicant's attention.

In iGreentree under *Maintenance* | *Codes* | *ReqStatus*, there is a Lookup Table specified for ReqStatus. To appear as a *Hot Job*, the ReqStatus value must have *IsHotJob=YES* in this table. When the Req becomes an open Req, instead of setting the ReqStatus to Open, it would be set to Open-Hot Job.

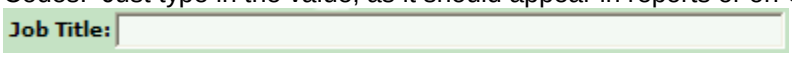
Typically, the Hot Jobs option is used in conjunction with the Notification field on the Requisition. An example of how it appears on the CSS Job Search results:

	Job Title	Location	Department	Job No.
1.	Administrative Assistant	Atlanta		2009-023
2.	Administrative Assistant	Atlanta		2009-024
3.	Administrative Assistant HOT	Chicago	Accounting	2010-017
4.	Administrative Assistant	Metroplex Center	Accounting	2010-018
5.	Senior Administrative Assistant	Metroplex Center	MIS	2009-019

Available Positions: *5*

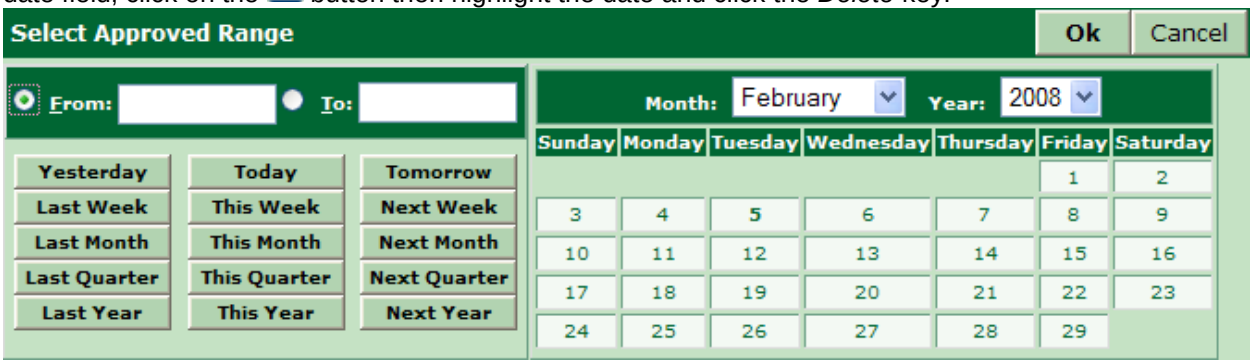
Text Fields

Job Title is a great example of a text field; notice that is no select list and it is not limited to a pre-set list of Codes. Just type in the value, as it should appear in reports or on CSS.



Date Fields

Requisitions may contain several fields which are formatted to accept a date. To enter the date, click on the button. The current date will be highlighted in bold, but any date can be selected. To clear a date field, click on the button then highlight the date and click the *Delete* key.



Coded Fields

Fields that contain a selection list are coded fields. These fields are limited to a pre-set list of codes and only codes from the selection list can be selected. Individuals with iGreentree Administrator access can add and remove codes from selection lists in Codes Maintenance.



Auto-Fill

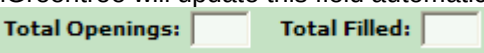
Some coded fields may have programming that allows the User to select a code from the select list and have the system automatically populate other fields on the screen. For instance, if the User selects Job Code typically Job Title, Job Group, Salary/Grade, and Exempt/NE will populate. The User can over-ride any field that is populated by the auto-fill.

Multiple Openings per Req (MOPR)

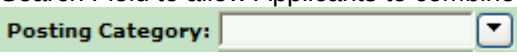
If a single Requisition is received that has a large number of identical openings, the User may prefer to enter them as a single Requisition with multiple openings. Time-To-Fill reporting will be different, but data entry and posting reports will be easier using this method. One master Requisition with multiple openings translates to the position appearing in postings and CSS only one time.

Multiple Openings per Req (MOPR) will only work if all of the openings are identical (same department, same location, same FTE, etc.). *If each opening is not the same, the MOPR feature should not be used. Instead enter each opening as a separate req.*

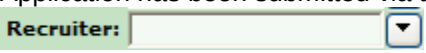
MOPR functionality is built into the *Total Open* and *Total Filled* fields which appear on the Req screen. Enter the total number of openings for this Req in the *Total Open* field. Leave Total Filled blank since iGreentree will update this field automatically as Requisitions are filled.



Posting Category
This field is used to group jobs by logical posting categories such as Accounting/Finance, Administrative/Clerical, etc. Usually there is a one-to-one correspondence between these *Posting Categories* and the Browse Jobs Categories displayed in CSS. This field can also be specified as a CSS Search Field to allow Applicants to combine searching on Posting Category with other search criteria.



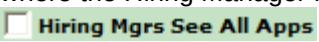
Recruiter
The HR person responsible for monitoring and approving the Requisition is called the *Recruiter*. Options are available to notify the Recruiter when certain changes occur to a Requisition such as a new Application has been submitted via the CSS module for a Hot Job.



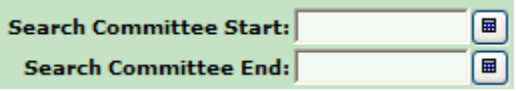
Hiring Manager
The person responsible for hiring. Options are available to notify the Hiring Manager when certain status changes occur to a Requisition (Req Status change) such as when a new Application has been submitted via the CSS module for a Hob Job.



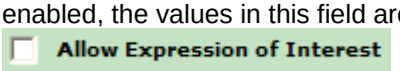
Hiring Mgrs See All Apps
When checked, this enables the Hiring Manager (and any Search Committee members) to see all Applications for this Requisition from the Hiring Manager module. This overrides the normal restrictions on viewing Applications based on the Application Result. Typically this is used for hard to fill positions where the Hiring Manager needs to see all Applicants for the job, without screening by HR.



Search Committee Start/End
A Search Committee is a group of one or more people who are in the system as Hiring Managers and are tasked with reviewing Applicants for a specific Requisition. They review Applications. The Start/End date is the period of time they have access to all the Applicants for the specified Requisition from the Hiring Manager Module. If no dates are specified then there are no date restrictions.



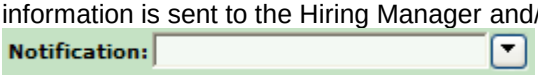
Allow Expression of Interest (EOI)
When checked, this enables an Applicant to submit a resume in response to a job opening on the CSS web site rather than submitting a full Application. It can speed up the Application process, especially for a Hot Job opening where the need may be critical. The EOI option must be enabled *under Maintenance | CSS Settings* and can be set for all Requisitions or for just individual Requisitions. If this option is not enabled, the values in this field are ignored.



An organization has the ability to choose from several variations:
- allow only resume submittal (no full application)
- allow only full application submittals
- allow either a resume submittal or full application

- allow a resume submittal and later a full Application submittal

Notification
The notification setting on the Requisition allows the User to determine *if* and *how* Applicant activity information is sent to the Hiring Manager and/or Recruiter specified on the Requisition.



Do Not Notify: This code is used if neither the Hiring Manager nor the Recruiter wish to automatically be notified via email on Applicant activity for this Requisition.
Notify Hiring Manager and Recruiter Immediately: This code should be used if you want BOTH the Hiring Manager and the Recruiter (listed on the Requisition) to be notified via email immediately when an Applicant has received an appropriate result code for this Requisition.
Notify Hiring Manager and Recruiter Periodically: This code should be used if you want BOTH the Hiring Manager and the Recruiter (listed on the Requisition) to be notified via email periodically (usually 2-3 times daily) when an Applicant has received an appropriate result code for this Requisition.
Notify Hiring Manager Immediately: This code should be used if you want the Hiring Manager listed on the Requisition to be notified via email immediately when an Applicant has received an appropriate result code for this Requisition.
Notify Hiring Manager Periodically: This code should be used if you want the Hiring Manager listed on the Requisition to be notified via email periodically (usually 2-3 times daily) when an Applicant has received an appropriate result code for this Requisition.
Notify Recruiter Immediately: This code should be used if you want the Recruiter listed on the Requisition to be notified via email immediately when an Applicant has received an appropriate result code for this Requisition.
Notify Recruiter Periodically: This code should be used if you want the Recruiter listed on the Requisition to be notified via email periodically (usually 2-3 times daily) when an Applicant has received an appropriate result code for this Requisition.

This is tied to the following *Maintenance* | *System Settings* | *AppReq reviewer Notification* options in iGreentree. See the *Administration and Maintenance* chapter for details.

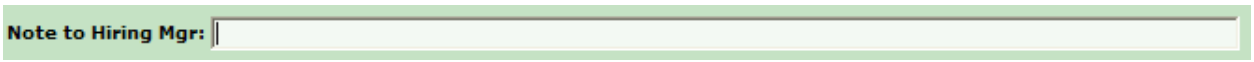
- AppReq Notification Email output Format
- AppReq Notification Email Subject Line
- AppReq Notify Reviewer – Hiring Mgr Batch
- AppReq Notify Reviewer – Hiring Mgr Immediately
- AppReq Notify Reviewer – Recruiter Batch
- AppReq Notify Reviewer – Recruiter Immediately

The contents of the letters sent to both Hiring Managers and Recruiters are maintained in *Maintenance* | *Letters*. Each result code (New Applicant, Reject Education, etc) has a place for your organization to assign a notification value to it. These values were set up by the implementation team. For more information on editing letters, assigning them to actions and assigning code values please visit the *Administration and Maintenance* chapter of this User Manual.

Assessment Process
This field, if displayed, allows the selection of a third party assessment process such as Talent Plus. Contact Greentree for more information on third party assessment vendor interfaces.



Note to Hiring Mgr
The content of this field is displayed in the Hiring Manager Module when the Hiring Manager is viewing the Requisition.



Other Fields
The remainder of the Requisition fields may have been tailored to meet organizational needs. Enter data in each field, making sure that everyone is in agreement on how each field will be used.

Saving a New Requisition

Once a Requisition is entered, the User must Save the Requisition to have a Requisition number assigned. The date entered and name of the person who entered the Requisition will also display. In addition, the *Action, History,* and *Attachment* menus become accessible.



The buttons at the top of the window change, allowing Users to enter another Requisition or continue working on the same one. Data can be saved at any time and then the User can continue entering additional data if needed. If the User forgets to save after entering additional data on an existing record, he/she will be prompted whether to save changes when they try to close the window.

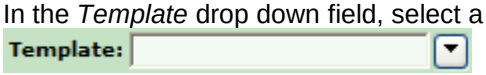
Entering Another Requisition

Selecting the Add New button will return the User back to the *Add New Requisition* screen where another Requisition can be entered.

Using a Template for Data Entry

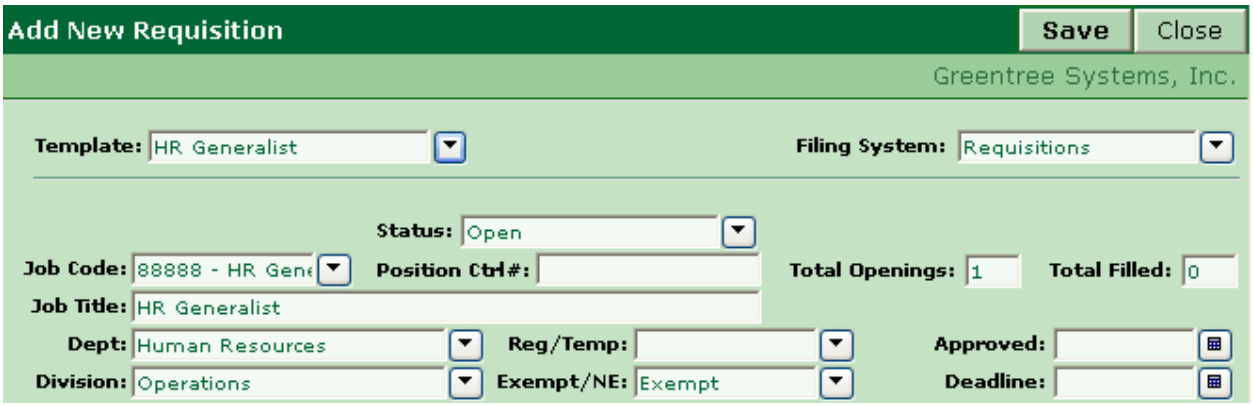
Although it may take time for the initial set up, data entry with a *Template* makes entering a new Requisition much quicker.

In the *Template* drop down field, select a previously created template from the list of Templates.



Pick a template already created then choose Ok. If a Filing System is entered first, and if a *Template* is then chosen that does not have a Filing System, the field data will be erased. So select the Template first, then the Filing System.

The Req screen appears with many of the fields already filled in.



The User may over-ride any of the template populated data, and add the data that is specific to that particular opening. Once finished updating the Requisition, he/she can click **Save** to retain the data and have a Req number assigned.

Creating and Using Templates

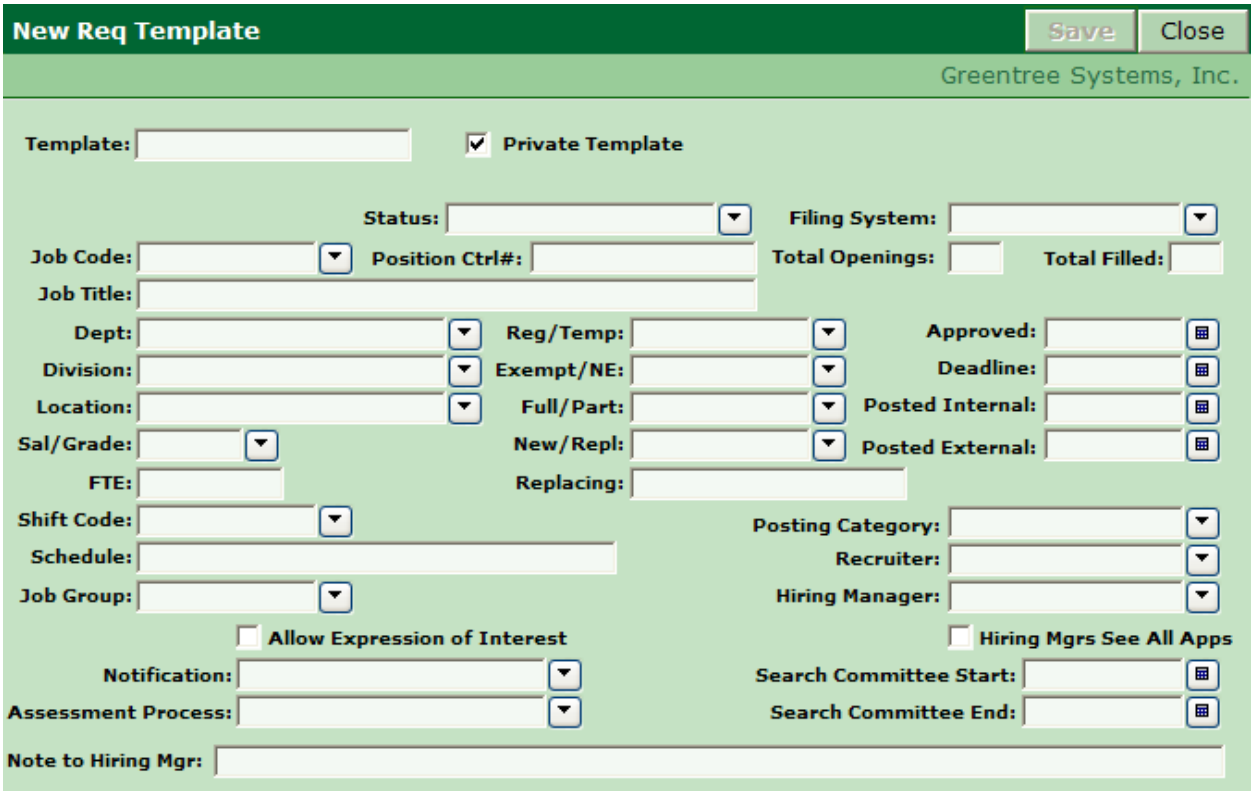
To enter several similar Requisitions, or to copy existing Requisitions and/or Attachments, a *Template* can be used. There are three ways to create templates: copy an existing Requisition (discussed later in this chapter), create a template from scratch, or copy an existing template.

Create a Template

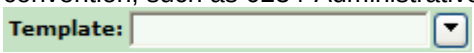
To create a Requisition Template from scratch go to Req Templates on the main menu and select *Add Req Template*.



A blank *New Req Template* form will appear for data entry. Requisition Templates that are going to be used to enter Requisitions should contain only data that is consistently the same for the position that the Template will be used to add.



The name of the template should be entered on the *Template* field. Greentree suggests that the name of the Template clearly identify the type of position this Template was designed to add. When using Req Templates with the Hiring Manager module, it may be helpful to use a "Job Code – Job Title" naming convention, such as 0234-Administrative Assistant.

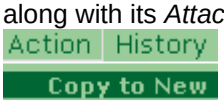


The Template can be designated *Private* or *Public*. The default is to make a Template *Private*. *Private* Templates can only be viewed and used by the User who created it. Templates need to be Public if they are to be used by other Users, Resume Inboxes, Hiring Manager Module, etc.

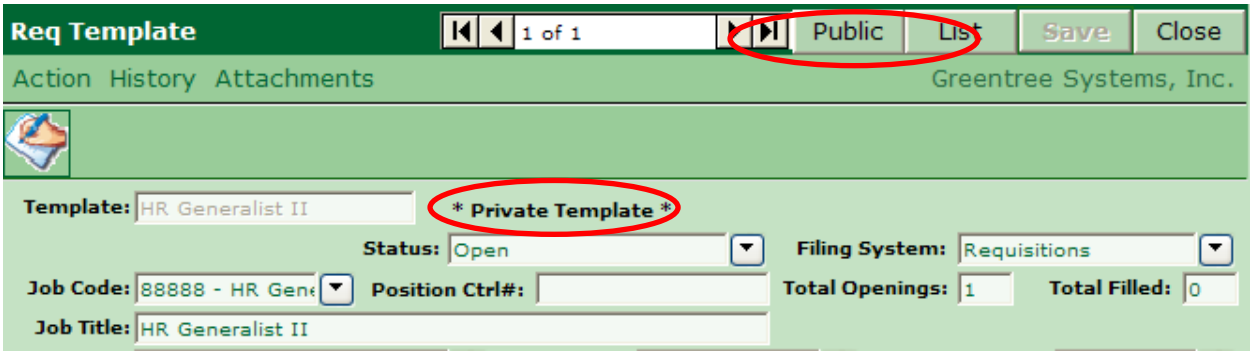


Copy an Existing Template

Copying an existing Template can greatly speed up the creation of similar templates. With the Req Template to be copied in Edit View, go to the *Action* menu and select *Copy to New.* The entire Template along with its *Attachments* and *History* will be copied.



The User is prompted for the name of the new template. Enter the name and click *OK*. The new template defaults to be Private, regardless of the type of the original template.



Click the Public button to make the new template Public. Modify any fields necessary to correspond to the new template such as Job Code and Job Title. Click Save to save the changes. All attachment data is copied to the new template. Modify the attachments to correspond to the new template using the steps described below.

Attachment Data

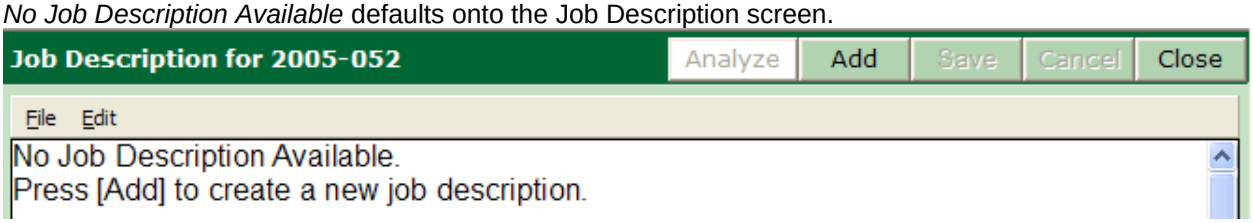
Regardless of whether initial data came from Hiring Manager or was entered directly in iGreentree, there are several Attachments that HR may need to complete.

Entering Job Descriptions

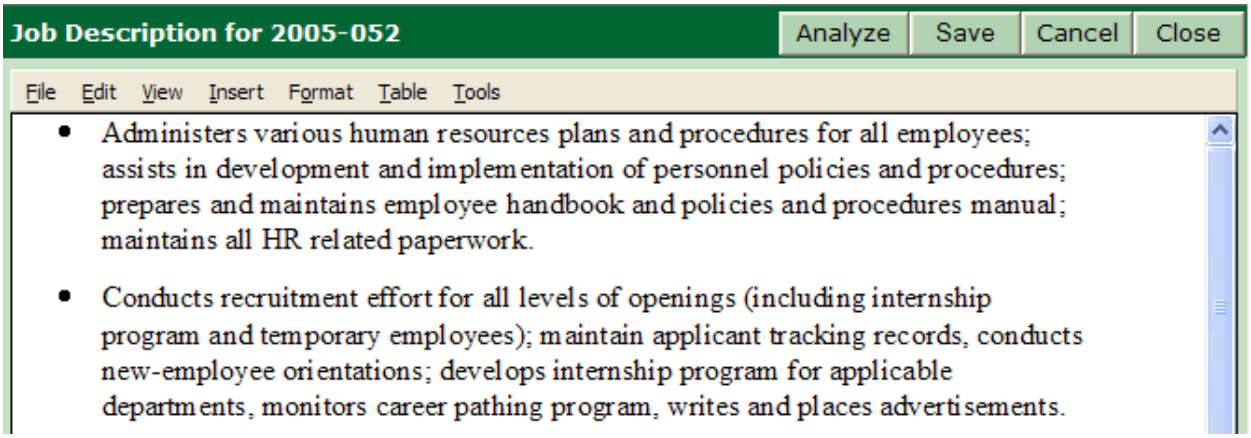
The User can enter a Job Description by selecting *Job Description* from the *Attachments* menu.



No Job Description Available defaults onto the Job Description screen.



Selecting the Add button will automatically remove the not available verbiage and allow the job description text to be entered.


Job Description for 2005-052
Analyze
Save
Cancel
Close
File Edit View Insert Format Table Tools
Administers various human resources plans and procedures for all employees; assists in development and implementation of personnel policies and procedures; prepares and maintains employee handbook and policies and procedures manual; maintains all HR related paperwork.
Conducts recruitment effort for all levels of openings (including internship program and temporary employees); maintain applicant tracking records, conducts new-employee orientations; develops internship program for applicable departments, monitors career pathing program, writes and places advertisements.

NOTE: The Analyze button is a tool for Search Criteria functionality and will be discussed within the *Find Matching Apps/Search Criteria* section of this chapter.

Text Editor Capability

The following menu choices are available from this window:

Menu	Option	What Used For?
File	Print	To print the current window without going to Reports.
File	Page Setup	To change the margins or other formatting before printing this window. Adjustments to left and right margins may affect text wrapping on screen. All margin values must be non-zero if any values are changed.
Edit	Undo	To undo the last change. Only the most recent change may be undone.
Edit	Cut	To cut out highlighted text, either to delete it or to hold it in the Clipboard to be pasted elsewhere.
Edit	Copy	To copy a string of highlighted text, for pasting elsewhere.
Edit	Paste	To insert text that was copied or cut earlier. The text goes in wherever the cursor is when the option is selected.
Edit	Paste without Format	
Edit	Clear	To cut out highlighted text without putting it in the Clipboard for later pasting.
Edit	Select All	To highlight all of the text in the current window at once.
Edit	Find…	To find a particular word or phrase within the text. Can search up or down, can turn the Match case option on or off.
Edit	Replace…	Same options as find, but can replace found text with a different word or phrase.
View	Standard Toolbar	To display a toolbar with shortcuts for File, Edit, & Insert menu options.
View	Format Toolbar	To display a toolbar with shortcut buttons that match options from Format menu.
Insert	Page Break	To insert a forced page break. May be most helpful for letter maintenance when a multiple page letter is needed.
Insert	Picture…	To insert a graphic. Choices include .BMP .TIF, & .WMF files.
Insert	Date	To insert the current date. Not needed in the Notes window since iGreentree automatically inserts the date and time when the new Note is *Saved.*
Insert	Time	To insert the current time. Not needed in the Notes window since iGreentree automatically inserts the time (from the server) when the new Note is *Saved.*

Format	Font	To change the font of selected text. Also can be used to change font size.
Format	Paragraph	To change formatting of selected text, including line spacing and indents.
Format	Paragraph Frames	To draw lines around selected text
Format	Tabs…	To add, remove or modify tab specifications.
Format	Bullets and Numbering…	To add, remove or change the format of bulleted or numbered lists.
Format	Increase Indent	To increase the indention of the current list item.
Format	Decrease Indent	To reduce the indention of the current list item.
Format	Bold	To turn bolding on and off for selected text.
Format	Italic	To turn italics on and off for selected text.
Format	Underline	To turn underlining on and off for selected text.
Format	Color	To change color of selected text.
Format	Background Color	To change color behind selected text.
Format	Left	To set alignment for selected text to left justification.
Format	Center	To set alignment for selected text to center justification.
Format	Right	To set alignment for selected text to right justification.
Format	Justified	To set alignment for selected text to both left and right justification.
Table	Insert	To insert a table at the current cursor location.
Table	Delete	To delete current row, column or entire table.
Table	Split	Splits a table into 2 tables above or below current cursor location.
Table	Select	To select either the current row, column or entire table
Table	Grid Lines	Adds or removes grid lines of all tables.
Table	Property	To change the properties for the current table.
Tools	Spelling	To spell check all text in this window.
Tools	Thesaurus	To look for synonyms for the selected word, then replace if desired. (Try with the word "experience".)

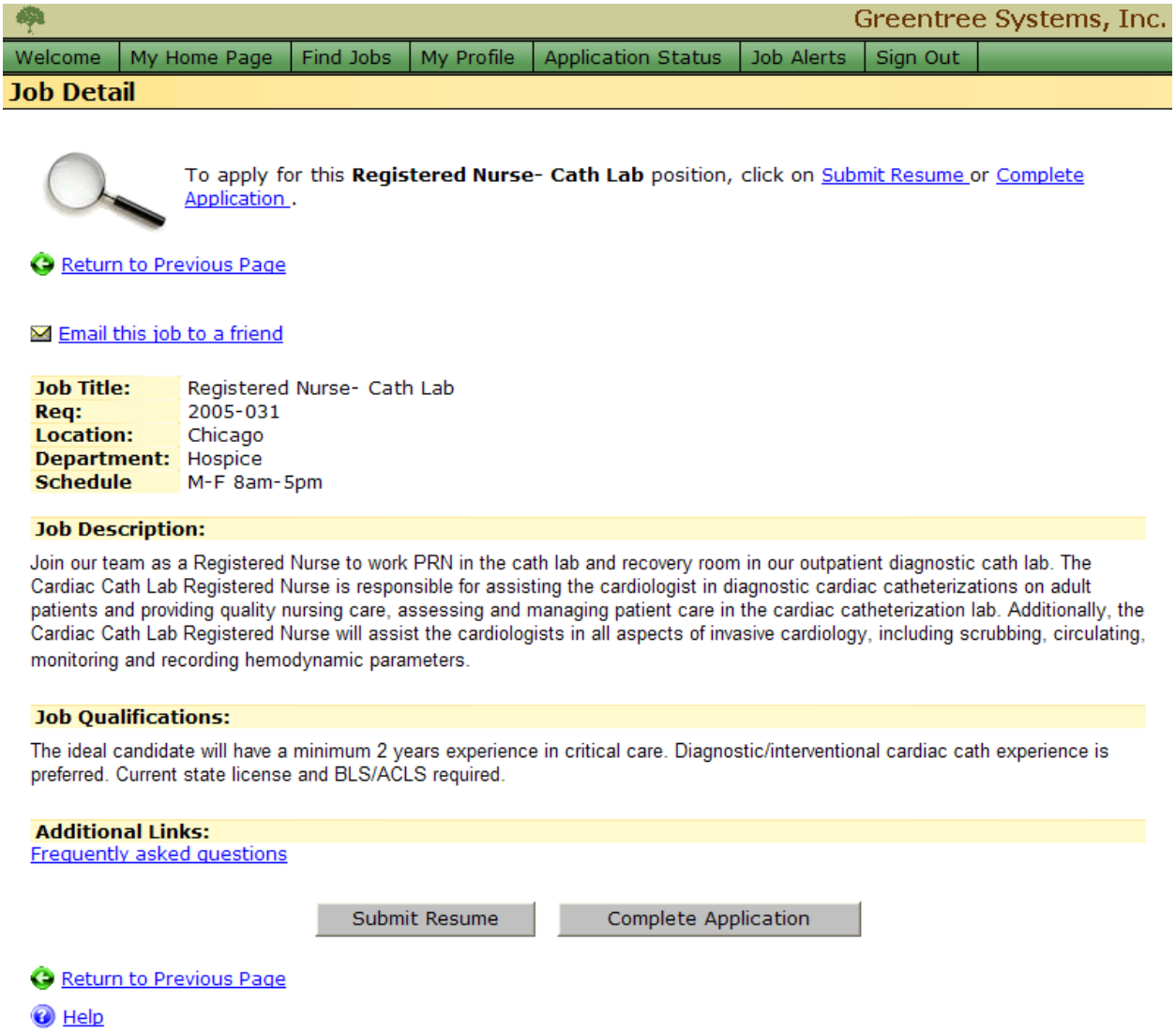
NOTE: Some of the items described above are only available within a specific context such as Table | Delete. If a table is not present and selected, it cannot be deleted and therefore that menu item would appear in gray. Items shown in gray on the menus and not described above are not currently available in iGreentree.

Many of the options above also have keyboard shortcuts, such as *Ctrl+P* for Print. The shortcuts are displayed next to each item in its menu. Users can memorize the keyboard shortcuts for functions used frequently.



These same editing functions are available for *Job Qualifications, Notes, Resumes,* and *Letter Maintenance*.

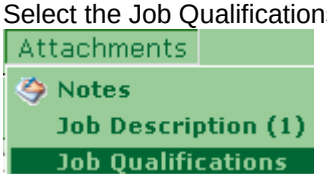
The Job Description will appear in the Job Detail page of Candidate Self-Service (CSS).


Greentree Systems, Inc.
Welcome
My Home Page
Find Jobs
My Profile
Application Status
Job Alerts
Sign Out
Job Detail
To apply for this Registered Nurse- Cath Lab position, click on Submit Resume or Complete Application .
Return to Previous Page
Email this job to a friend
Job Title: Registered Nurse- Cath Lab
Req: 2005-031
Location: Chicago
Department: Hospice
Schedule M-F 8am-5pm
Job Description:
Join our team as a Registered Nurse to work PRN in the cath lab and recovery room in our outpatient diagnostic cath lab. The Cardiac Cath Lab Registered Nurse is responsible for assisting the cardiologist in diagnostic cardiac catheterizations on adult patients and providing quality nursing care, assessing and managing patient care in the cardiac catheterization lab. Additionally, the Cardiac Cath Lab Registered Nurse will assist the cardiologists in all aspects of invasive cardiology, including scrubbing, circulating, monitoring and recording hemodynamic parameters.
Job Qualifications:
The ideal candidate will have a minimum 2 years experience in critical care. Diagnostic/interventional cardiac cath experience is preferred. Current state license and BLS/ACLS required.
Additional Links:
Frequently asked questions
Submit Resume
Complete Application
Return to Previous Page
Help

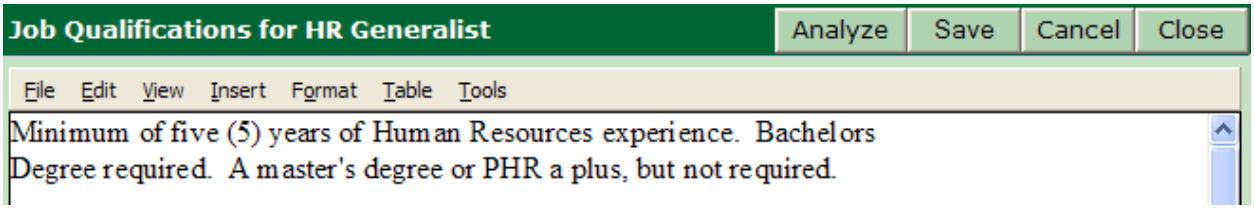
Note that if the Requisition is set up to *Allow Expression of Interest* then the Applicant has the option of either just submitting a resume or completing the full Application. If the Requisition does not allow this option, then only one button and link is displayed and the Applicant can only apply for the job by completing the Application.

Entering Job Qualifications

Select the Job Qualifications from the Attachments menu.

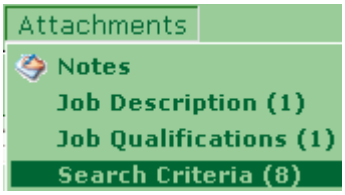


This *Attachment* works just like the *Job Description*. The *Job Qualifications* appear in the Job Detail page of CSS below the *Job Description* (see image above).


Job Qualifications for HR Generalist
Analyze
Save
Cancel
Close
File Edit View Insert Format Table Tools
Minimum of five (5) years of Human Resources experience. Bachelors Degree required. A master's degree or PHR a plus, but not required.

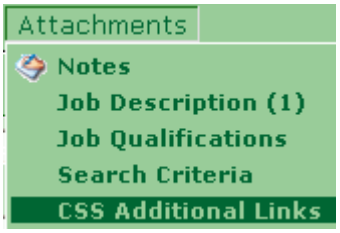
Entering Search Criteria

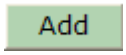
Search Criteria is a search engine that allows the User to find existing Applicants. This topic will be discussed in the *Find Matching Apps/Search Criteria* section found later in this chapter.



Entering CSS Additional Links

If using the Candidate Self-Service module (CSS), *CSS Additional Links* may be entered for each Requisition. These links are often used to provide the Applicant with quick access to information relevant to the Requisition they are viewing. The User can enter additional links by selecting *CSS Additional Links* from the *Attachments* menu.



Selecting the 

button will allow entry. The entry into the *Link Display Text* column determines what the Applicant sees. The *URL to Link to* column should contain the actual URL that the Applicant should be directed to if they click the link. The URL must contain the complete path including http://.

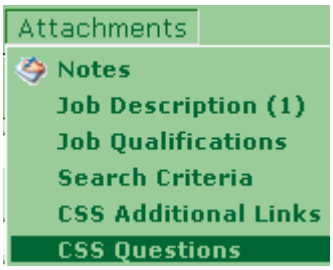


The above example would appear at the bottom of the CSS *Job Detail* page should an Applicant select this particular Requisition.

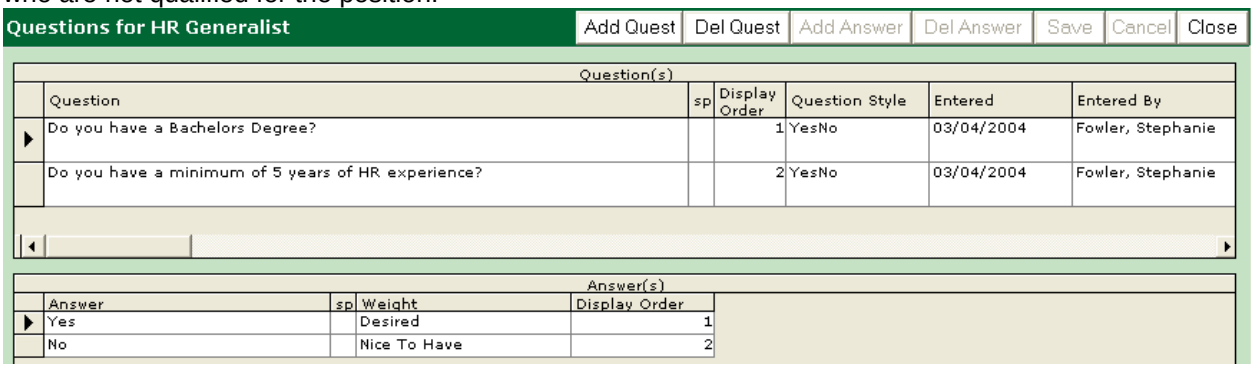


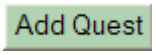
Entering CSS Questions

CSS Questions provides a simple and powerful way to gather information and prescreen Applicants. The *CSS Questions* designated for a Requisition will be asked of every Applicant who applies for that Requisition using Candidate Self-Service (CSS). The Applicant must answer the prescreen questions in order to proceed to the actual Application. The Applicant's answers become part of their read-only online Application for the selected Requisition. The User can enter prescreen questions by selecting *CSS Questions* from the *Attachments* menu.



CSS Questions can be used to gather additional information about the Applicant or to screen out those who are not qualified for the position.

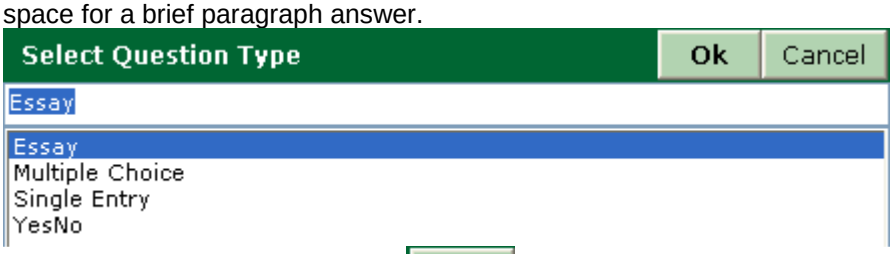


The User must select 

to enter a new question. He/She will then be prompted to select a question type. There are four question types to choose from: Essay, Multiple Choice, Single Entry, and YesNo.

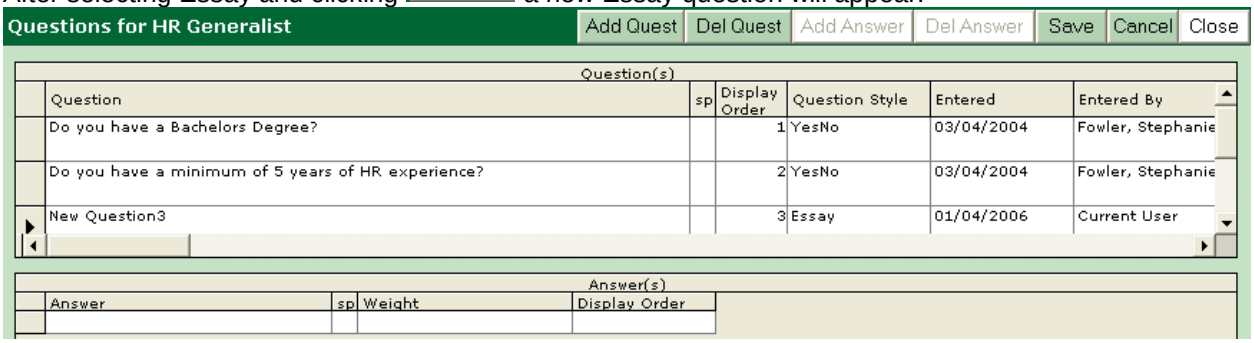
Essay Questions

The first available question type is *Essay.* This question type should be used when the question requires space for a brief paragraph answer.

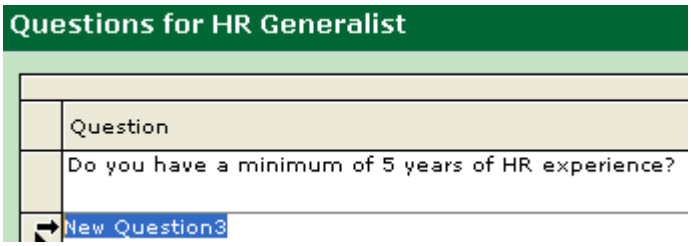


After selecting Essay and clicking 

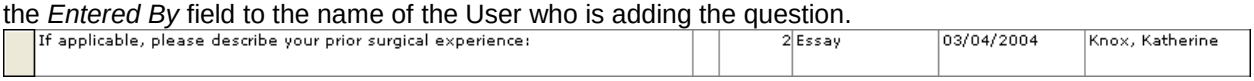
a new Essay question will appear.



The User must click his/her mouse over the words *New Question* so that *New Question* is highlighted.

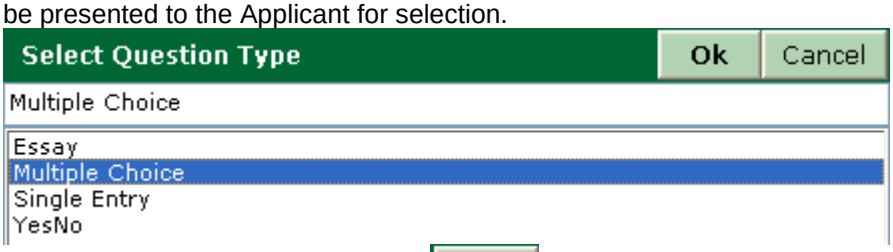


The *New Question* can then be typed over with an *Essay* question that is open ended in format and encourages more than a one word answer. Choosing Save will change the "Current User" entry in the *Entered By* field to the name of the User who is adding the question.



Multiple Choice Questions

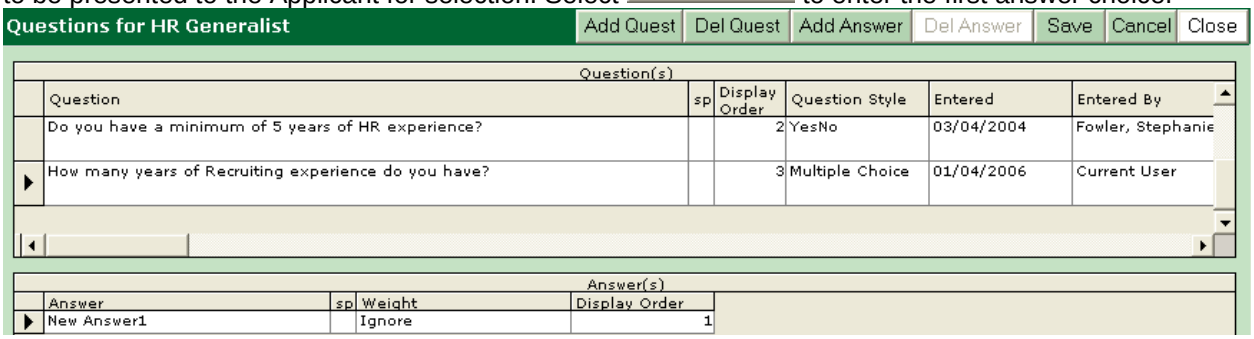
Another question type is *Multiple Choice.* This question type should be used when specific answers are to be presented to the Applicant for selection.



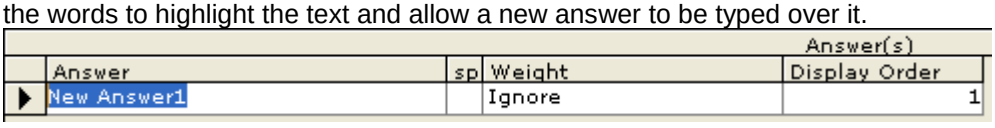
After choosing *Multiple Choice* click Ok and a new *Multiple Choice* question will appear.



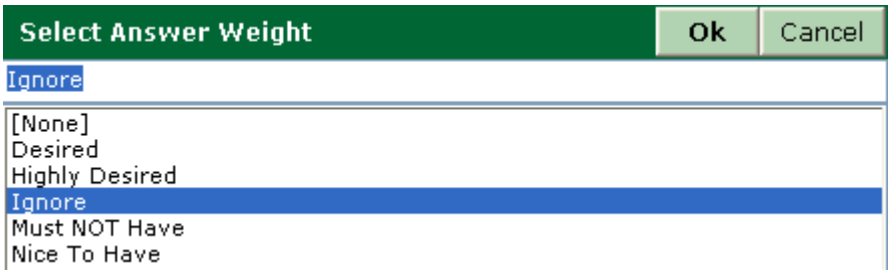
After the *Multiple Choice* question has been entered, the User must then add the answer choices that are to be presented to the Applicant for selection. Select Add Answer to enter the first answer choice.



The words *New Answer* will populate in the Answer column and the User must click his/her mouse over the words to highlight the text and allow a new answer to be typed over it.



Each *Multiple Choice* answer can be assigned a weight. Each weight will be used to calculate the Applicant's prescreen score. In addition, the assigned answer weight can also be used to automatically disqualify the Applicant. *Ignore* is the default for all answers that are added. To select a different weight simply click in the weight column for the weight to be altered and then click the ▼ button. Choose the weight and click Ok.



The User must select Add Answer again to add additional answers for the multiple choice question to provide the Applicant with the desired choices.

An example of a Multiple Choice question's answer set up would be:

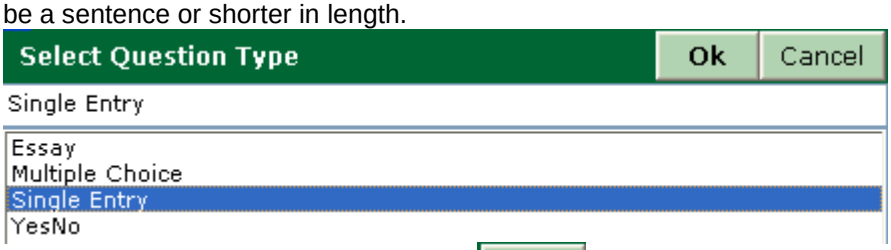
	Answer(s)			
	Answer	sp	Weight	Display Order
▶	Less than 1 year		Must NOT Have	1
	1-2 years		Ignore	2
	2-3 years		Nice To Have	3
	3-5 years		Highly Desired	4
	More than 5 years		Desired	5

The *Multiple Choice* answers will list in the order defined in the *Display Order* column, smallest to largest. The User can alter the display order by simply highlighting one of the *Display Order* numbers and changing it to a higher or lower number.

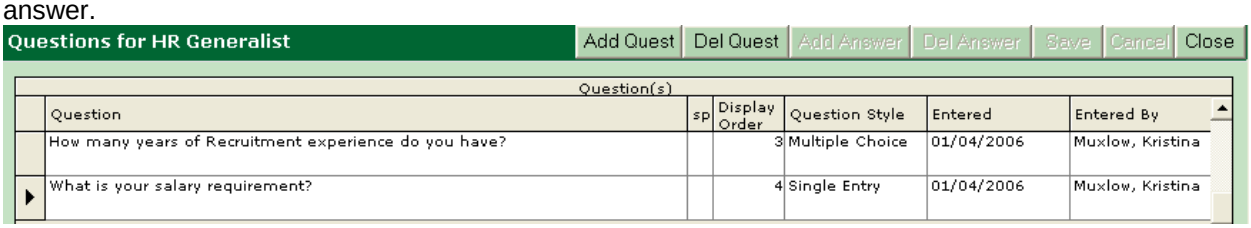
Choosing Save will change the "Current User" entry in the *Entered By* field to the name of the User who is adding the question.

Single Entry Questions

*Single Entry is a*nother question type. This question type should be used when the expected answer will be a sentence or shorter in length.

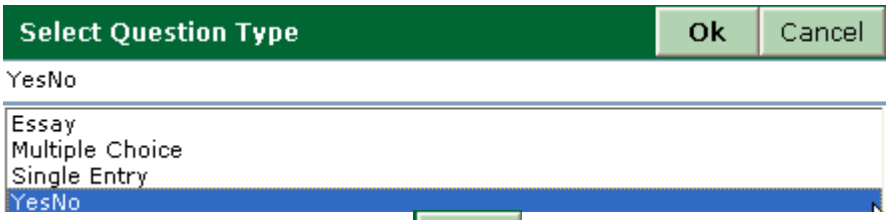


After selecting *Single Entry* and clicking Ok a new *Single Entry* question will appear. The User must click his/her mouse over the words *New Question* in order to highlight the text and allow a question to be typed over it. A *Single Entry* question should be entered in an open ended format that encourages a brief answer.

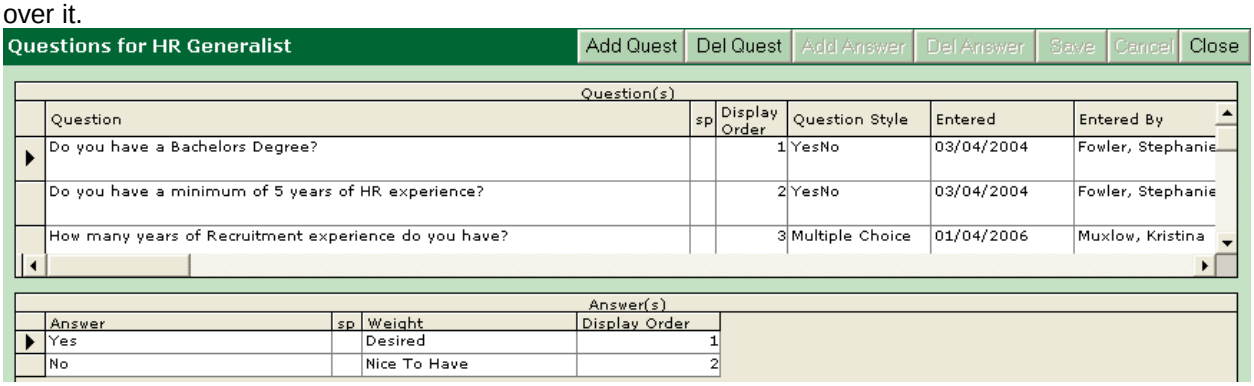


YesNo Questions

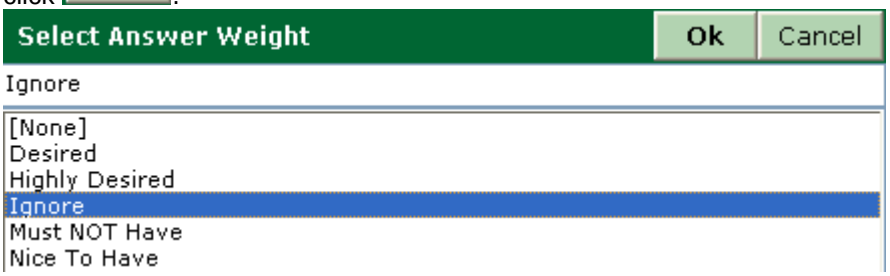
The final question type is *Yes/No.* This question type should be used when the question can be answered with an answer of either Yes or No.



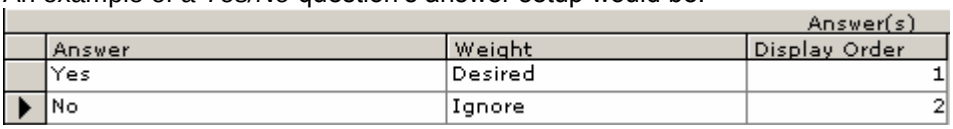
After selecting *YesNo* and clicking Ok a new *YesNo* question will appear. The User must click his/her mouse over the words *New Question* in order to select the text and allow a question to be typed over it.



After the question is entered, a weight can be assigned to the *Yes* and *No* answers. The weights will be used to calculate the Applicant's prescreen score (discussed later in this Chapter). In addition, the assigned answer weight can also be used to automatically disqualify the Applicant (Must NOT Have). *Ignore* will be the default for all answers that are added. To select a different weight simply click in the weight column for the weight to be altered and then click the ▼ button. Choose the desired weight and click Ok.



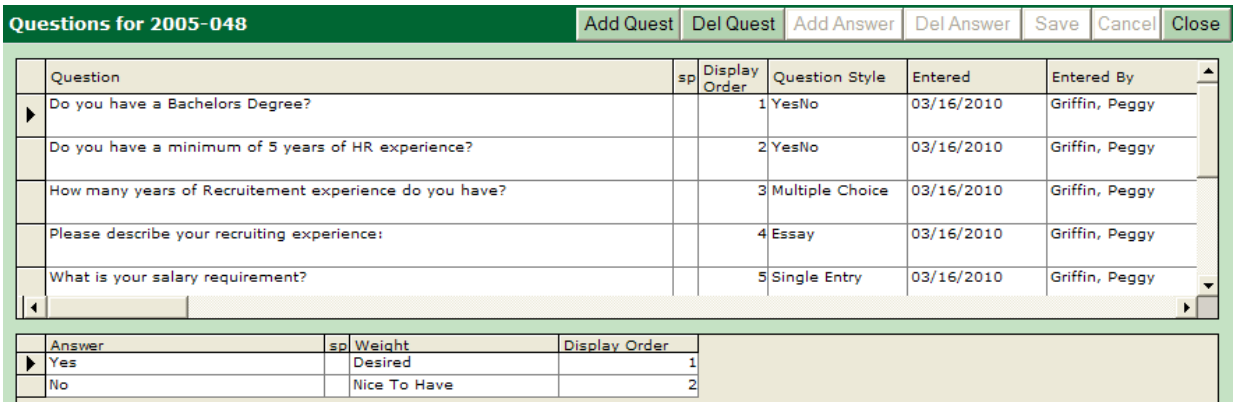
An example of a *Yes/No* question's answer setup would be:



Spell Check: When finished entering questions and/or answers the User can click in the SP column to spell check the question or answer.

Question Presentation Order

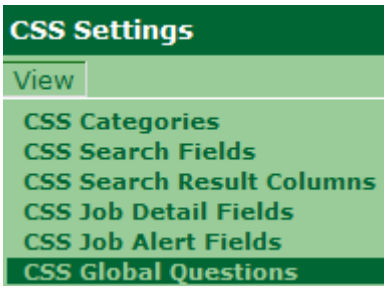
If needed, the User can reorder the entered questions by clicking in the *Display Order* column. The questions will list in the order defined in the *Display Order* column, smallest to largest. The User can alter the display order by simply highlighting one of the *Display Order* numbers and changing it to a higher or lower number.


Questions for 2005-048
Add Quest
Del Quest
Add Answer
Del Answer
Save
Cancel
Close
Question
sp
Display Order
Question Style
Entered
Entered By
Do you have a Bachelors Degree? 1 YesNo 03/16/2010 Griffin, Peggy
Do you have a minimum of 5 years of HR experience? 2 YesNo 03/16/2010 Griffin, Peggy
How many years of Recruitement experience do you have? 3 Multiple Choice 03/16/2010 Griffin, Peggy
Please describe your recruiting experience: 4 Essay 03/16/2010 Griffin, Peggy
What is your salary requirement? 5 Single Entry 03/16/2010 Griffin, Peggy
Answer
sp
Weight
Display Order
Yes Desired 1
No Nice To Have 2

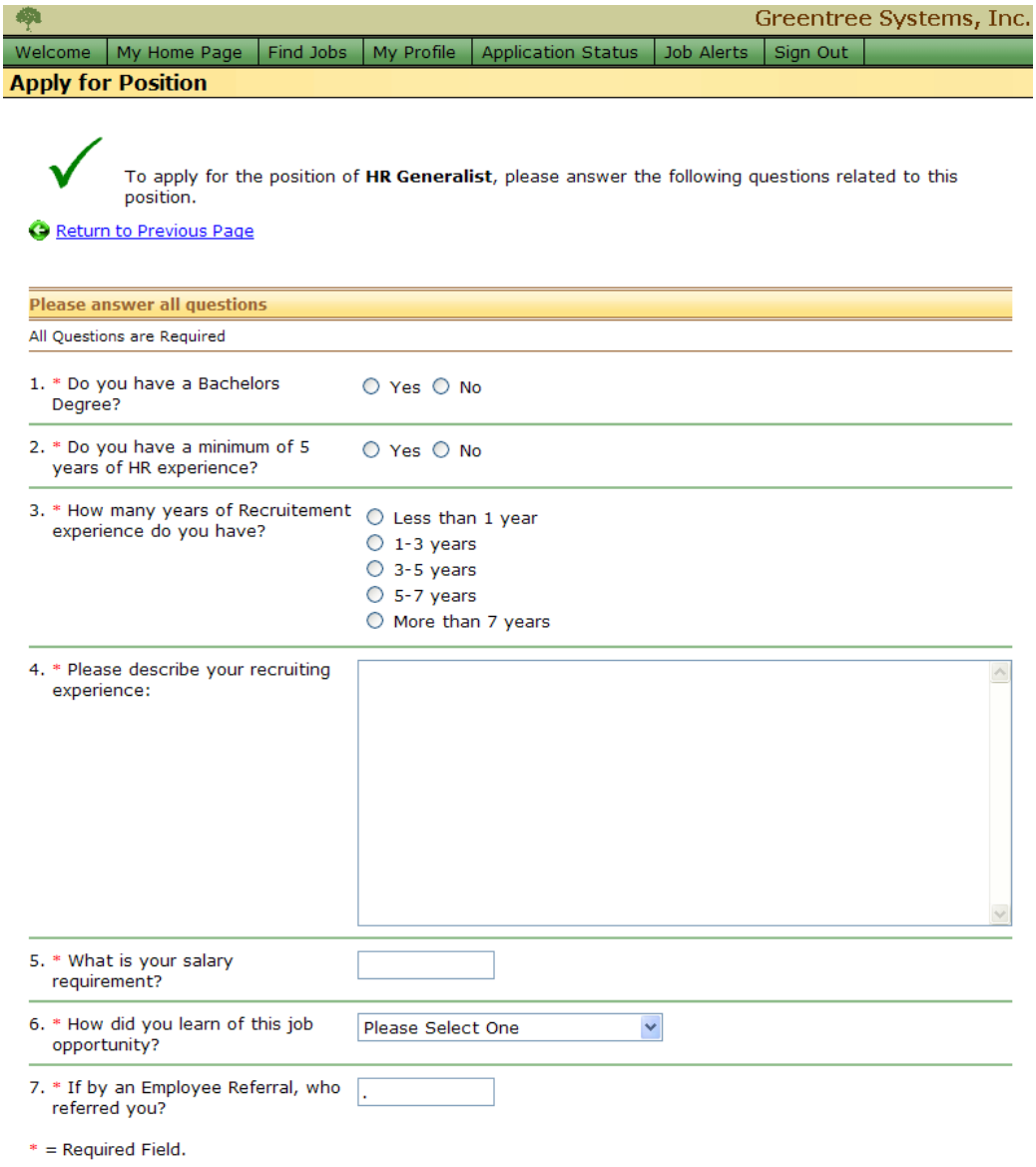
Prescreen questions will be presented to the Applicant in Candidate Self Service (CSS) after they select a position and choose to apply for it, but before the Application is presented for them to update and/or review and submit.

Note that there are five prescreen questions defined for the Requisition yet seven prescreening questions are presented to the Applicant. The last two questions are *CSS Global Questions* which allow a HR User to specify questions that are asked of every Applicant, for every Requisition. These questions are added to the end of the Requisition-specific questions.

To define a CSS Global Question, click on the *Maintenance* | *CSS Settings* main menu then click on the *View* | *CSS Global Questions* menu at the top of the *CSS Settings* window.

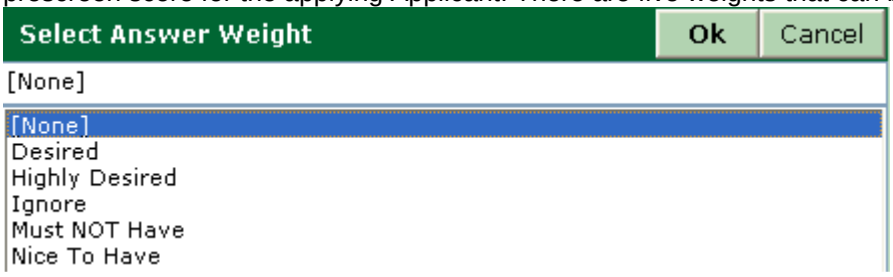





Greentree Systems, Inc.
Welcome
My Home Page
Find Jobs
My Profile
Application Status
Job Alerts
Sign Out
Apply for Position
To apply for the position of HR Generalist, please answer the following questions related to this position.
Return to Previous Page
Please answer all questions
All Questions are Required
1. * Do you have a Bachelors Degree? Yes No
2. * Do you have a minimum of 5 years of HR experience? Yes No
3. * How many years of Recruitement experience do you have? Less than 1 year 1-3 years 3-5 years 5-7 years More than 7 years
4. * Please describe your recruiting experience:
5. * What is your salary requirement?
6. * How did you learn of this job opportunity? Please Select One
7. * If by an Employee Referral, who referred you?
* = Required Field.

Question Answer Weight

The Multiple Choice and YesNo questions carry an answer weight which can be used to calculate a prescreen score for the applying Applicant. There are five weights that can be assigned to each answer.



Desired: Is an answer weight that should be assigned to answers that are valued. This weight carries the second highest prescreen value. The standard weight for this answer weight is 4.

Highly Desired: Is an answer weight that should be assigned to answers that are highly valued. This weight carries the highest prescreen value. The standard weight for this answer weight is 6.

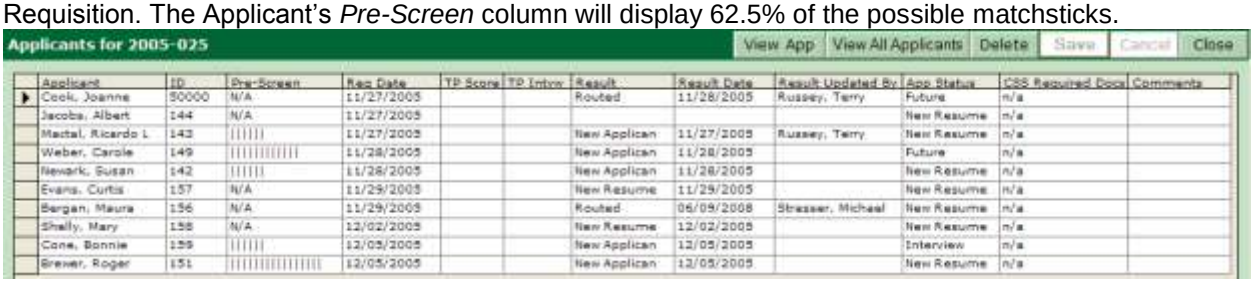
Ignore: Is an answer weight that should be used for answers that are neither positive nor negative. It carries no prescreen value. Ignore is the default weight assigned when adding answers. The standard weight for this answer weight is 0.

Must NOT Have: Is an answer weight that should be assigned to answers that are not sought after and are in fact to be avoided. This weight carries a negative prescreen value. **An Applicant who chooses an answer with this weight assigned will automatically be disqualified after submitting their Application.** The standard weight for this answer weight is -1.

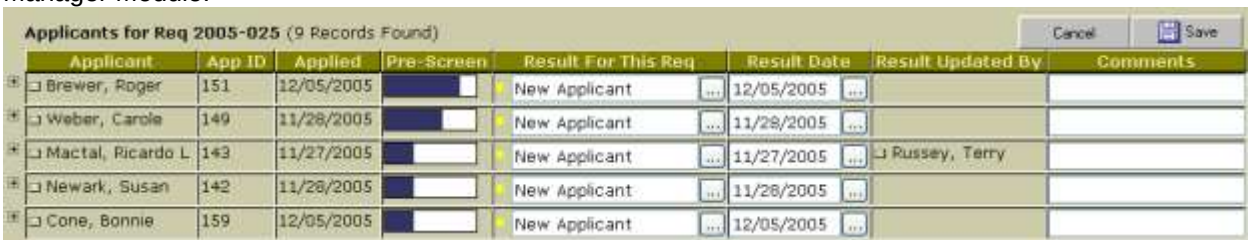
Nice To Have: Is an answer weight that is appropriately applied to answers that are favored, but not highly valued. The prescreen value for this weight is less that *Desired,* but more than *Ignore*. The standard weight for this answer weight is 1.

The Applicant's individual prescreen score is calculated as a percentage of the possible points for the Requisition. For instance, if there are four *CSS Questions* for a Requisition, and each has an answer that is weighted as "Desired" (4), the maximum possible prescreen score is 16. If an Applicant applies and chooses the "Desired" answers for two questions and chooses "Nice To Have" answers for the other two questions, he/she will have a total prescreen score of 10 out of 16 (or 62.5% of the maximum possible score).

The Applicant's prescreen score is then converted to display visually in the *Applicant History* for the Requisition. The Applicant's *Pre-Screen* column will display 62.5% of the possible matchsticks.

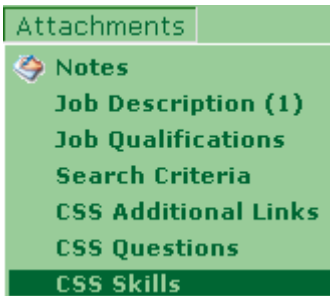

Applicants for 2005-025
View App
View All Applicants
Delete
Save
Cancel
Close
Applicant
ID
Pre-Screen
Req Date
TP Score
TP Intrvw
Result
Result Date
Result Updated By
App Status
CSS Required Docs
Comments
Cook, Joanne 50000 N/A 11/27/2005 Routed 11/28/2005 Russey, Terry Future n/a
Jacobs, Albert 144 N/A 11/27/2005 New Resume n/a
Mactal, Ricardo L 143 11/27/2005 New Applican 11/27/2005 Russey, Terry New Resume n/a
Weber, Carole 149 11/28/2005 New Applican 11/28/2005 Future n/a
Newark, Susan 142 11/28/2005 New Applican 11/28/2005 New Resume n/a
Evans, Curtis 157 N/A 11/29/2005 New Resume 11/29/2005 New Resume n/a
Bergan, Maura 156 N/A 11/29/2005 Routed 06/09/2008 Strasser, Michael New Resume n/a
Shelly, Mary 158 N/A 12/02/2005 New Resume 12/02/2005 New Resume n/a
Cone, Bonnie 159 12/05/2005 New Applican 12/05/2005 Interview n/a
Brewer, Roger 151 12/05/2005 New Applican 12/05/2005 New Resume n/a

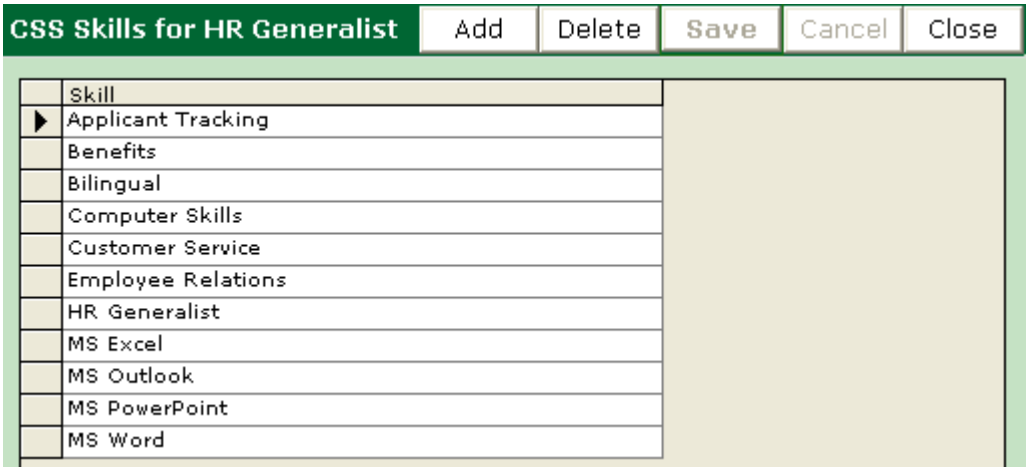
In addition, if the Applicant is presented to the Hiring Manager, the prescreen score is converted to display visually. The Hiring Manager will see 62.5% of the maximum length of the graphical bar in Hiring Manager Module.



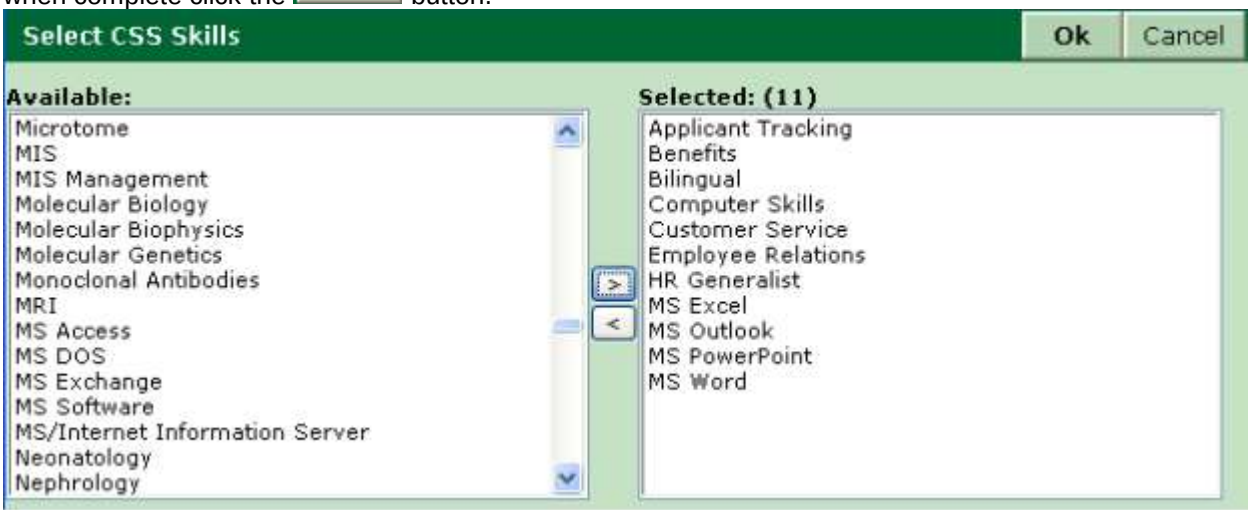
Entering CSS Skills

If using the Candidate Self-Service module (CSS), *CSS Skills* may be entered for each Requisition. The skills selected in *CSS Skills* define which skills will appear in all CSS Applications submitted for this particular Requisition. The applying Applicant will have the option to choose from these skills when they apply for this Requisition via CSS. *CSS Skills* can be accessed from the *Attachments* menu.



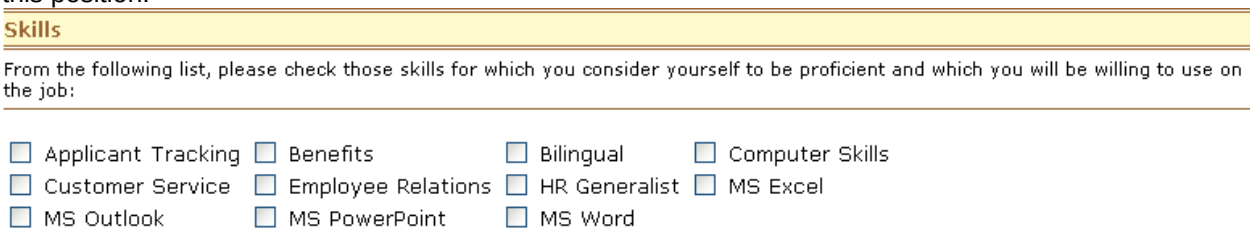


Click on Add to attain the available list of skills. Highlight a skill that is to be added and use the > button to move it to the *Selected* column. Repeat until all desired skills are on the *Selected* column, when complete click the Ok button.



Greentree recommends adding not only skills that are required for the position, but also skills that would be relevant to similar positions. For instance, if the Requisition is for an Administrative Assistant and requires Word and Excel, it may be useful to also enter Reception, Dictation, PowerPoint, Access, and Visio. The title Administrative Assistant does not mean the same thing in every company. These additional skills may help recruiters determine if the Applicant is under or over qualified and more suited to another opportunity.

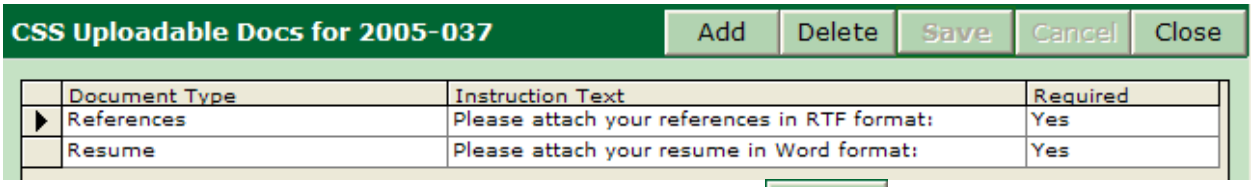
Here is an example of how the above selected skills will appear in CSS for an Applicant who applies for this position:

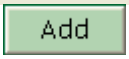


Entering CSS Uploadable Documents

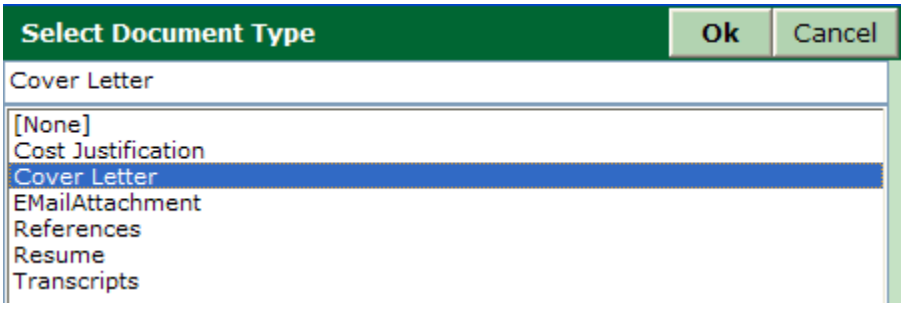
If using iGreentree's Candidate Self-Service module (CSS), *CSS Uploadable Documents* may be entered for each Requisition. *Uploadable Documents* are additional documentation that will be requested of each Applicant who applies for the Requisition. *Uploadable Documents* can be accessed from the *Attachments* menu.





To add a document to the *CSS Uploadable Documents* click the 

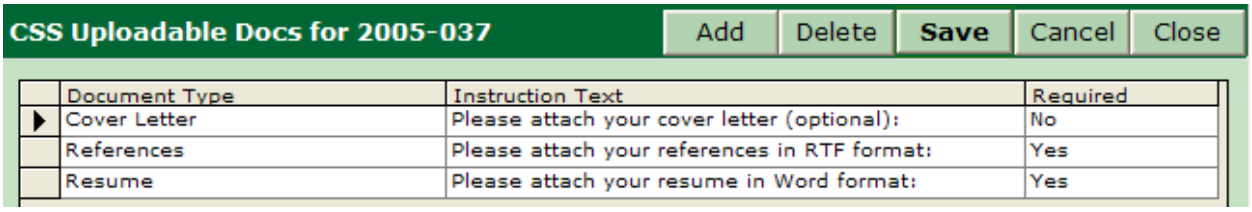
button to be presented with the document types that are available (document types can be added/edited in *Doc Types Maintenance*) then click OK.



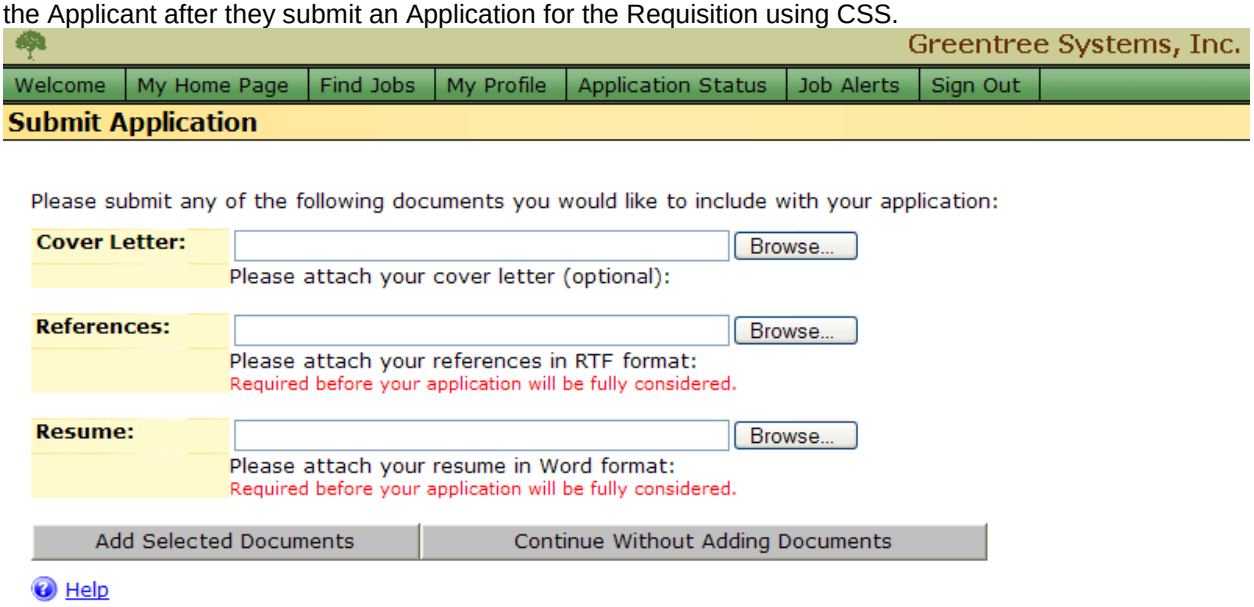
The selected Document Type will appear in the *Document Type* column. The User can enter instructional text for that document. Typically, the text should contain any needed details about what document is requested. File type does not need to be specified, as uploaded documents can be any of a list of valid file types as set under Maintenance | Doc Types | FileType.

The Required field indicates whether the Applicant must upload the specified document (Required = Yes) or if it is optional (Required = No).

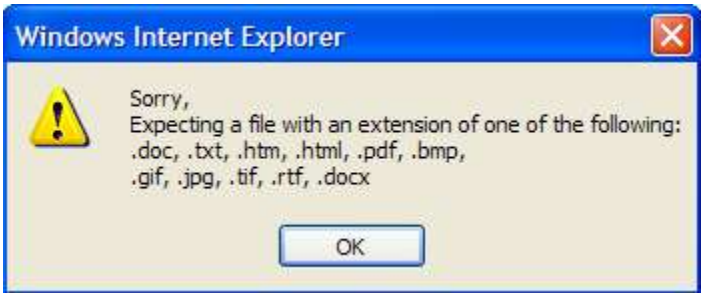
When all changes are complete, click Save to preserve the changes.



The request for additional documents that are set up in *CSS Uploadable Documents* will be presented to the Applicant after they submit an Application for the Requisition using CSS.

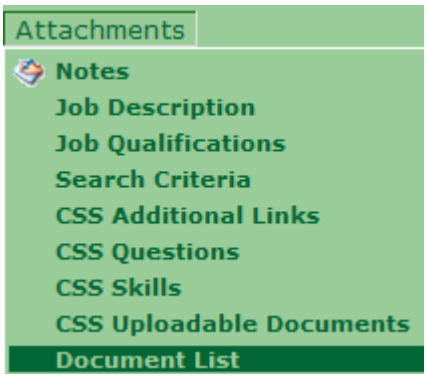


If any of the files are the wrong file type then the Applicant will receive an error message indicating what file types are accepted.

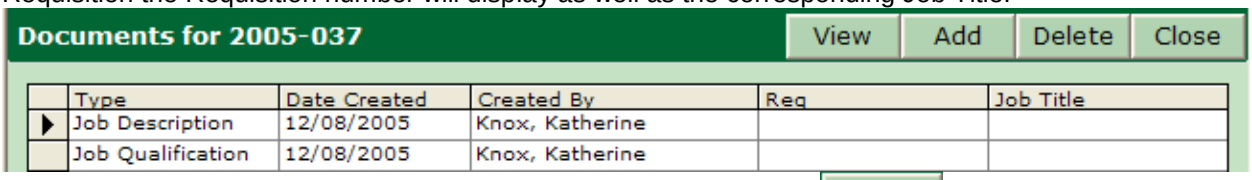

Windows Internet Explorer
Sorry,
Expecting a file with an extension of one of the following:
.doc, .txt, .htm, .html, .pdf, .bmp,
.gif, .jpg, .tif, .rtf, .docx
OK

Document List

As we approach the paperless office, Users may choose to save paper files electronically; additional documents that relate to the Requisition can also be added. To access, select *Document List* from the *Attachments* menu.

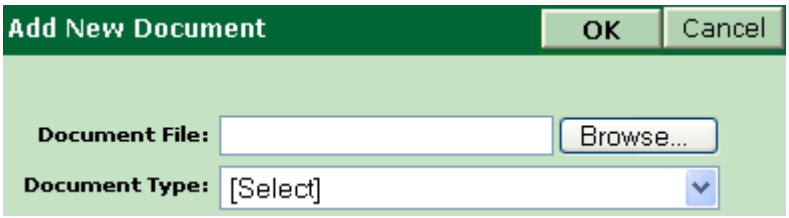


All available documents will be displayed along with information about when the document was added (*Date Created*) and who added it (*Created By*). In addition, if the document was added for a specific Requisition the Requisition number will display as well as the corresponding Job Title.



To view an existing document, select the document row and click the View button.

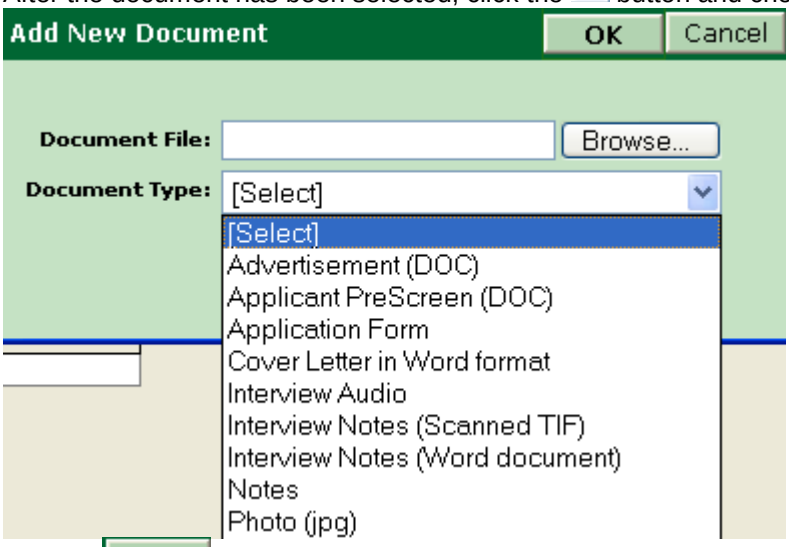
To add a document to the Requisition's *Document List*, click Add to get to display the *Add New Document* window.

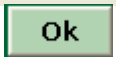


Choose Browse... to navigate to where the document to be added has been saved. Navigate by clicking the folders until you reach the folder where the document is stored and then double click the document to add it to the *Document File* field.

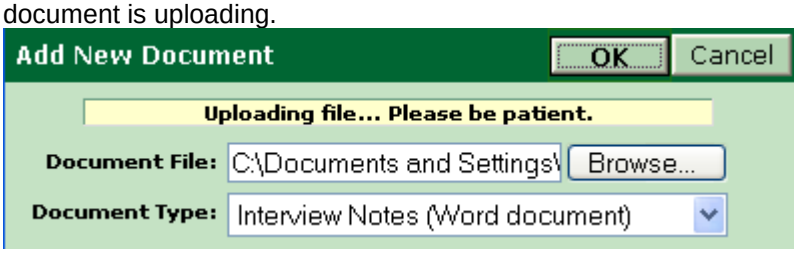


After the document has been selected, click the button and choose the *Document Type* from the list.

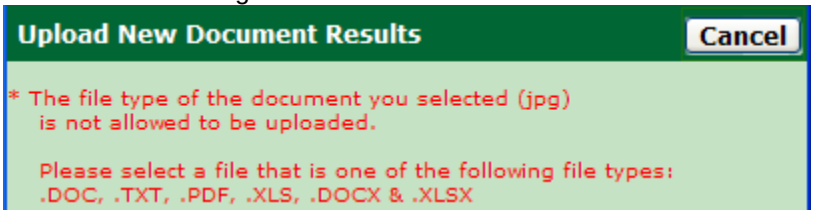


Choose 

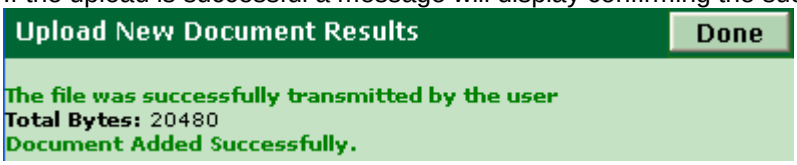
to add the document type. The *Add New Document* window will reflect that the document is uploading.



The file type required for the *Document Type* must match the file type for the document being attached. A file mismatch will generate an error.


Upload New Document Results
Cancel
* The file type of the document you selected (jpg)
is not allowed to be uploaded.
Please select a file that is one of the following file types:
.DOC, .TXT, .PDF, .XLS, .DOCX & .XLSX

If the upload is successful a message will display confirming the success.



The document will be added to the *Document List* after clicking Done.

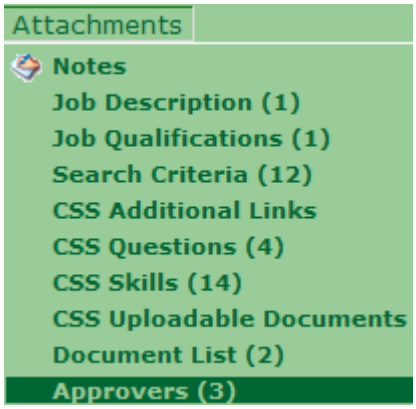
To add additional documents to the Requisition record, repeat the steps above.

To delete an existing document, select the document row and click the Delete button.

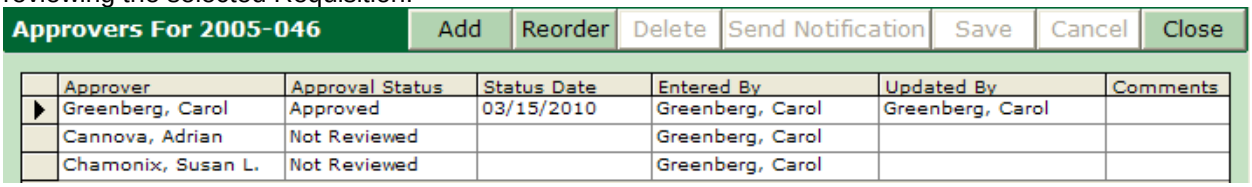
Adding/Editing Approvers

There are two different ways to add Approvers to a Requisition record, one using *Add Approvers* from the *Action* menu and the second using *Approvers* from the *Attachment* menu.





Approvers displayed may have been entered via the Hiring Manager and/or manually entered by clicking on the “Add” button. Requisitions must still be in the approval process in order to modify the list of approvers. The attachment displays information about each of the approvers and their progress in reviewing the selected Requisition.



Approver	Approval Status	Status Date	Entered By	Updated By	Comments
Greenberg, Carol	Approved	03/15/2010	Greenberg, Carol	Greenberg, Carol	
Cannova, Adrian	Not Reviewed		Greenberg, Carol		
Chamonix, Susan L.	Not Reviewed		Greenberg, Carol		

Approver: Is the name of the individuals who are assigned to review the Requisition.
Approval Status: Each approver record will display a status, which will reflect whether the Requisition has been “Not Reviewed”, “Approved”, or “Not Approved”.
Status Date: The date reflected is the date when the most recent change in Approval Status occurred.
Entered By: Is the name of the User or Hiring Manager who added the approver.
Updated By: Is the name of the User or Hiring Manager who made the most recent change to the approver’s Status
Comments: Each approver has the opportunity to comment on the Requisition they are approving. If they complete the comment field it will be displayed here.

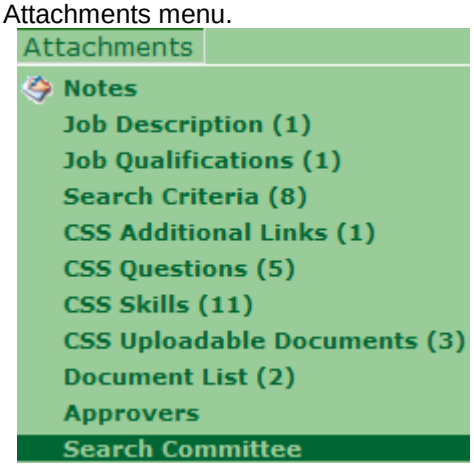
To add another approver simply click on the Add button and follow the prompts for Approver Name and Approval Status (typically set to “Not Reviewed”) and click on the Save button.

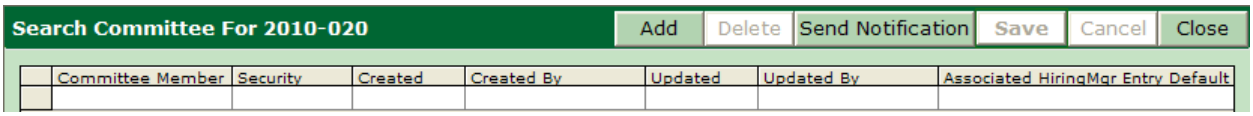
To change the order in which the approvals are made, use the Reorder button to change the order in which the names of the Approvers are listed.

The Send Notification button can be utilized to send email notification to a Hiring Manager that their approval is needed. The system will automatically send the email notifications in the order that the approvers are designated. However, in some circumstances a Hiring Manager may be unavailable and the recruiter may want to notify the next approver so as not to hold up the process.

Adding/Editing Search Committee Members

To add members to the Search Committee for a Requisition, select Search Committee on the Attachments menu.





To add a member to the Search Committee, click Add. Click on the name of the person to be added and click the Ok button. Answer the prompts until you are returned to the Search Committee screen then click Save. The Security setting for a Search Committee member is either *Read-Only* or *Update*. *Read-Only* allows the person to only review the Application but not add notes or comments or change the Applicant’s Application Status. *Update* allows the person to make changes to the Application record.

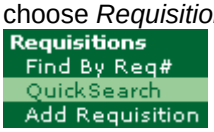
Once the member has been added, the User can inform the person by clicking Send Notification to send an email notification to the person.

The only field that can be changed for a Search Committee member is their security. To change their security setting, click on the line associated with the member so the ▶ appears to the left of their name. Then click in their *Security* to cause the ▼ button to appear. Click on the ▼ button to bring up the *Select Security* screen and make the desired change. Click the Ok button followed by the Save to save the change.

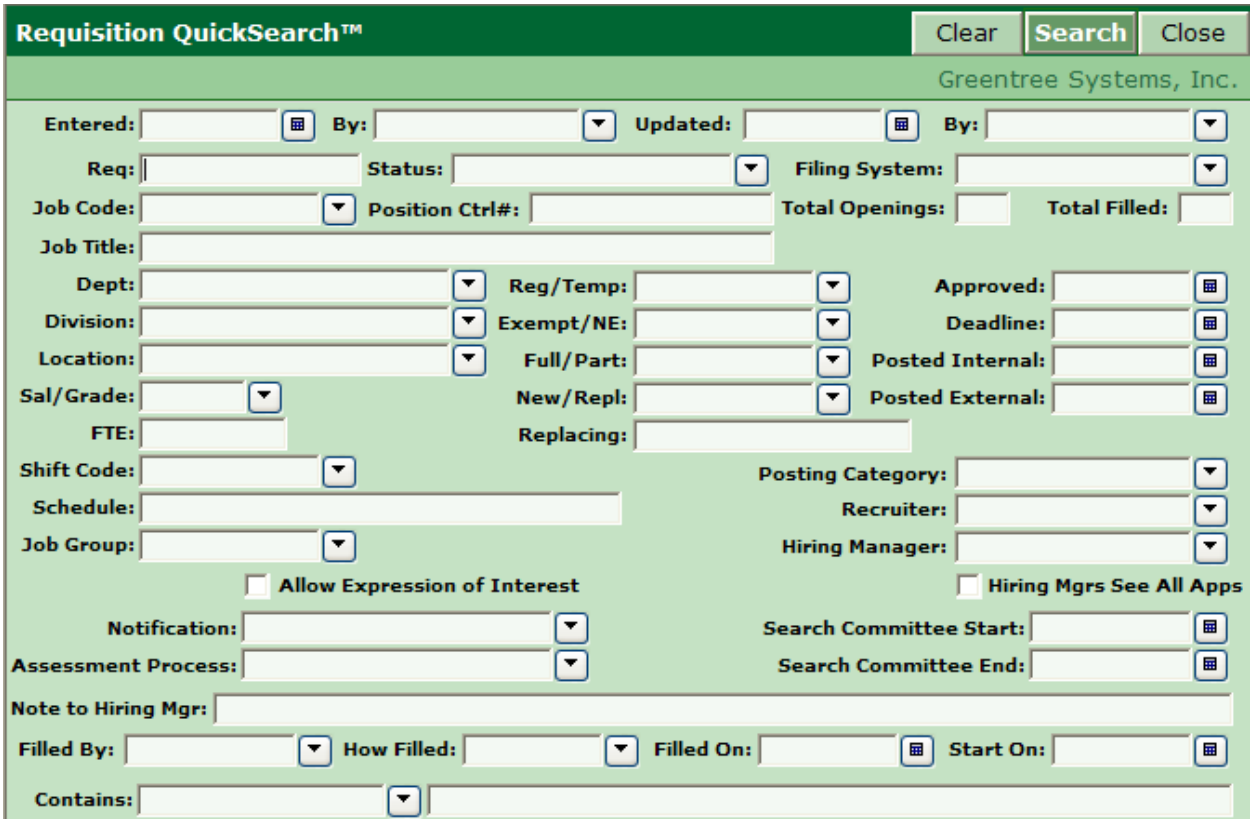
To remove a Search Committee member, click on the line associated with the member so the ▶ appears to the left of their name. Then click Delete followed by OK to confirm your action. Click Save to save your changes.

Finding Reqs that were Entered

Requisitions can be entered into iGreentree by a Hiring Manager (if the Hiring Manager Module is used) or by an HR User. Finding these Requisitions is important to the recruitment process. Within iGreentree, choose *Requisition QuickSearch* from the *Requisitions* main menu.



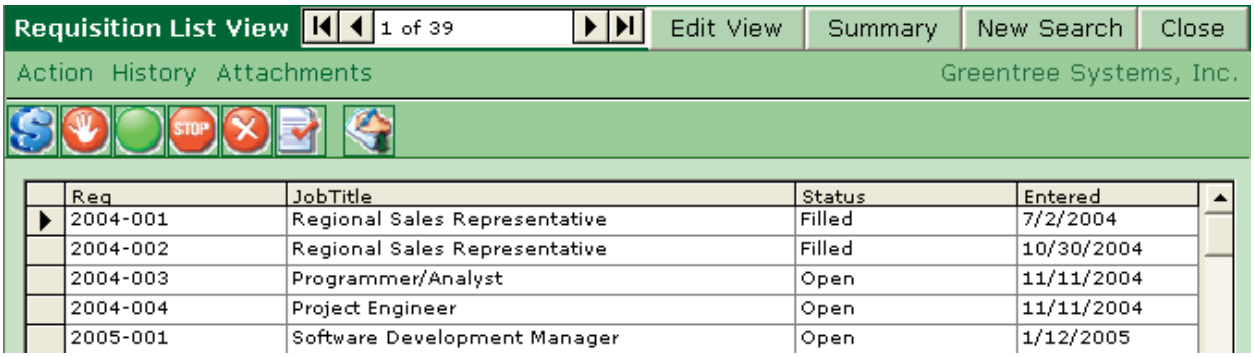
Periodic searches by Entered Date will find the new Requisitions, and allow HR to enter additional data and record the activity of the Req. *Users can also include additional criteria that will limit the search results to specific types of Reqs, such as those that have an Approved or Pending Approval Status.*



Once the new Requisitions have been found, Users can add or change data and/or Attachments, and perform *Actions* as needed (described in detail later in this Chapter).

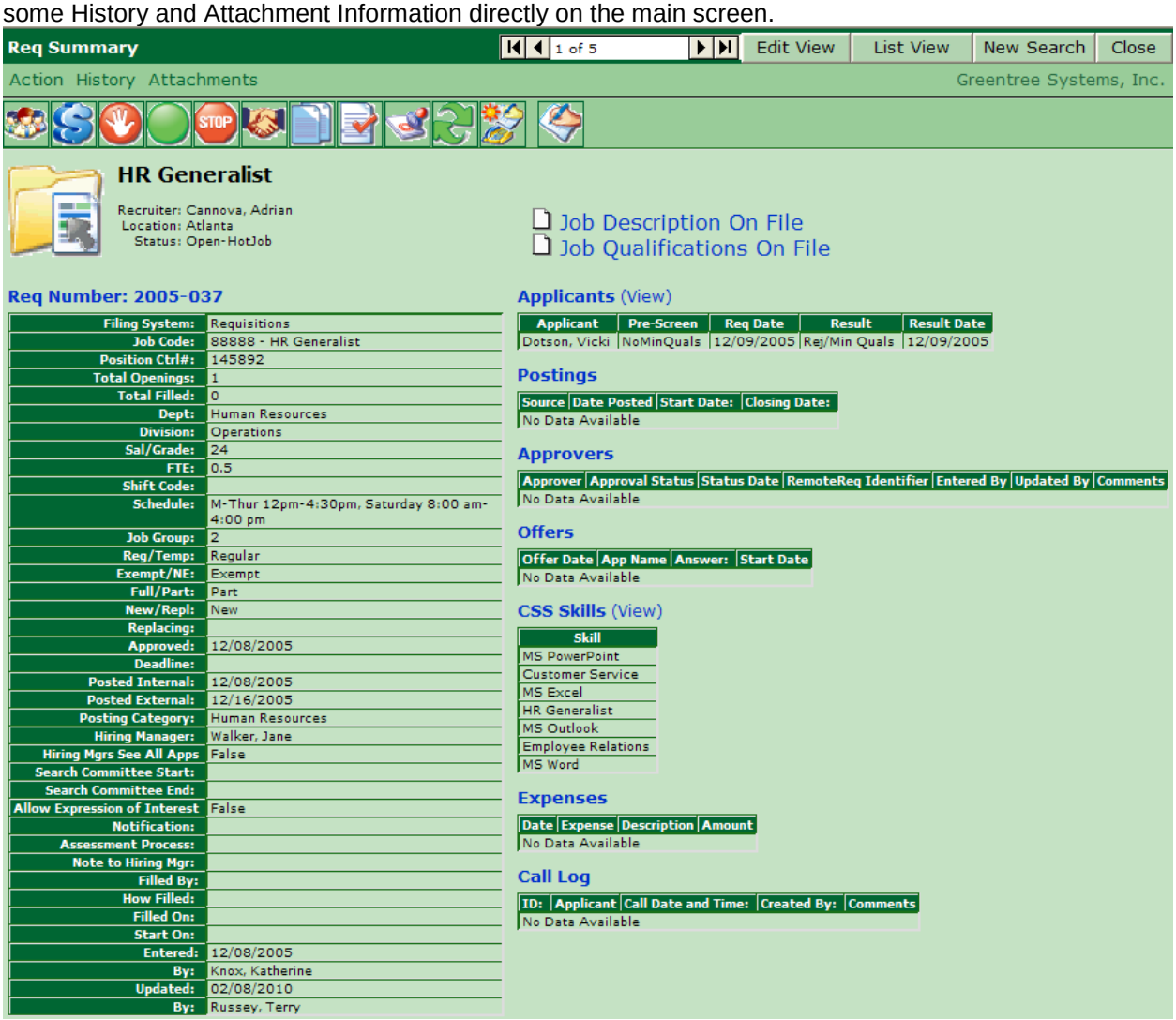
List View

The most common result from a search is a List View. Any time a User performs a search that returns more that one result (Requisition, Applicant, Source, etc), the results will be displayed in a list form. To switch from List View and view a single entry you may use the Summary or Edit View buttons.



Summary View

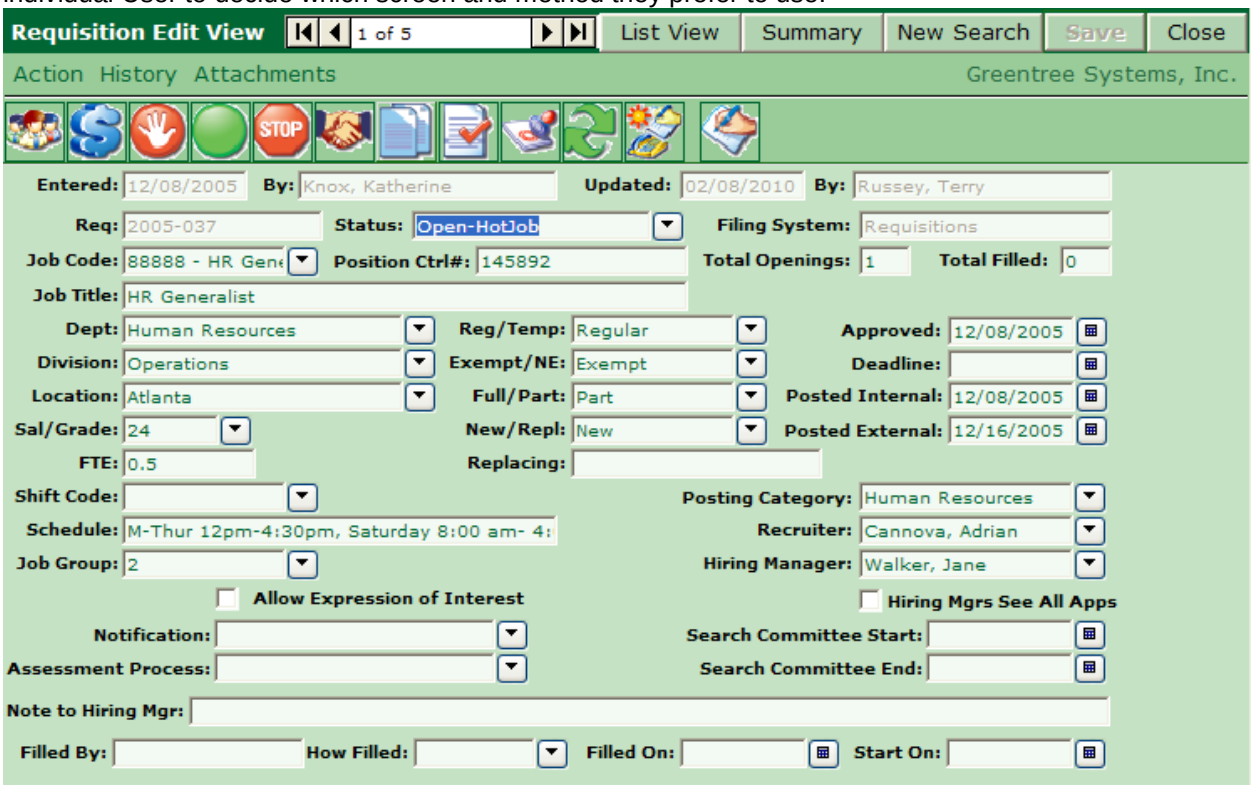
If a search is performed that returns a result of only one item, you will be brought directly to the *Summary View* screen for that item. The *Summary View* allows the User to see the main information as well as some History and Attachment Information directly on the main screen.



The items highlighted in blue are hyperlinks and will take the User to the appropriate History or Attachment menu (detailed later in this chapter). Clicking on Req Number: XXXX-XXX will take the User to the *Edit View* screen, the User may also click on Edit View.

Edit View

This screen is similar to the *Summary View* screen, it displays information for a single search result. *Edit View* does not have quick links to *History* or *Attachments* nor does it have that information displayed on the main screen. Instead, both *Edit View* and *Summary View* have access to all the same information via the main menus (*Actions, History and Attachments*) and via the Quick Launch buttons. It is up to the individual User to decide which screen and method they prefer to use.



Requisition Activity

Once a Requisition is entered into iGreentree and approved the recruiting process really begins. The Requisition is typically a trigger for a whole series of events. The recruiter can do things like post a position, place it on hold, or search for Applicants (to name a few). These events are referred to as *Actions* in iGreentree.

If the User is in Edit View or Summary View, only the selected Requisition will be affected by the *Action* (Single Actions). If the User is in List View, all of the records that are currently displayed will be affected by the *Action* (Mass Actions), regardless of whether any record is highlighted or not. Users have the option to remove one or more records from the list before performing the *Action*, affecting only the remaining records.

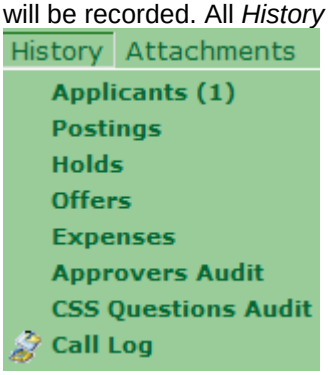
Single Actions (Edit or Summary View):



Mass Actions (List View):

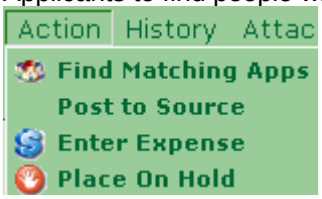


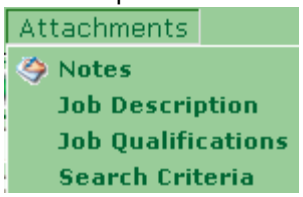
Requisition Actions help to update records and generate output for all of the common events that occur during the recruitment process. Once an Action has been performed in iGreentree a *History* of that event will be recorded. All *History* can be reviewed by going to the *History* menu of an individual Requisition.



Find Matching Apps/Search Criteria

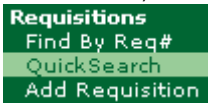
Find Matching Apps is an *Action* that is a short cut for running the Search Criteria search engine (located under attachments) on the Requisition. The defined search criteria can be used to search through existing Applicants to find people who have the requirements for a position.





To begin we must first set up our Search Criteria for the specific Requisition.

To illustrate, start by selecting *QuickSearch* from the *Requisitions* menu.



Find all Open Requisitions by entering *Open* on the *Status* field and clicking 

.

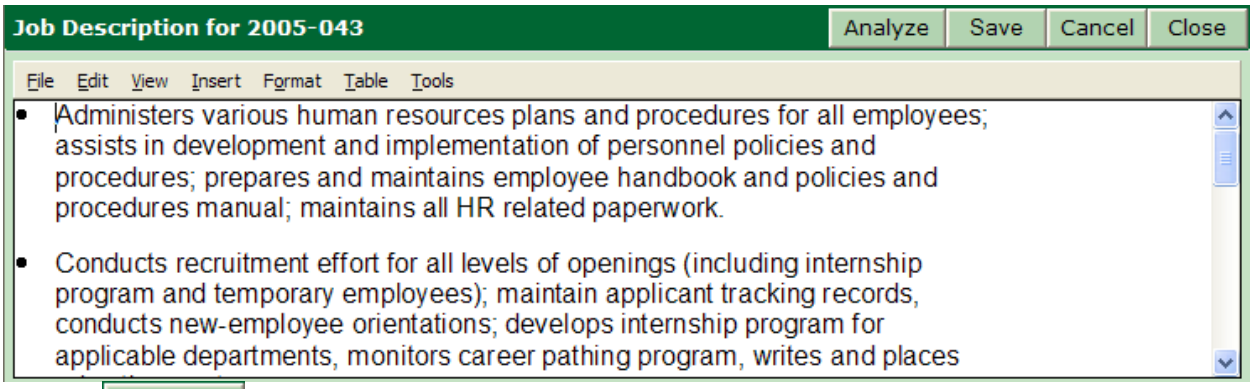
Switch to the *Edit View* for the selected Req by placing the indicator next to the Requisition to be viewed and clicking on the Edit View button.

Analyze a Job Description or Qualifications

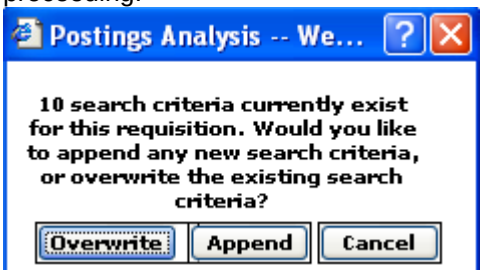
The system can assist the User with starting to build the search criteria by analyzing the job description and job qualifications.

From the *Attachments* menu, first choose *Job Description*.




Job Description for 2005-043
Analyze
Save
Cancel
Close
File Edit View Insert Format Table Tools
Administers various human resources plans and procedures for all employees; assists in development and implementation of personnel policies and procedures; prepares and maintains employee handbook and policies and procedures manual; maintains all HR related paperwork.
Conducts recruitment effort for all levels of openings (including internship program and temporary employees); maintain applicant tracking records, conducts new-employee orientations; develops internship program for applicable departments, monitors career pathing program, writes and places

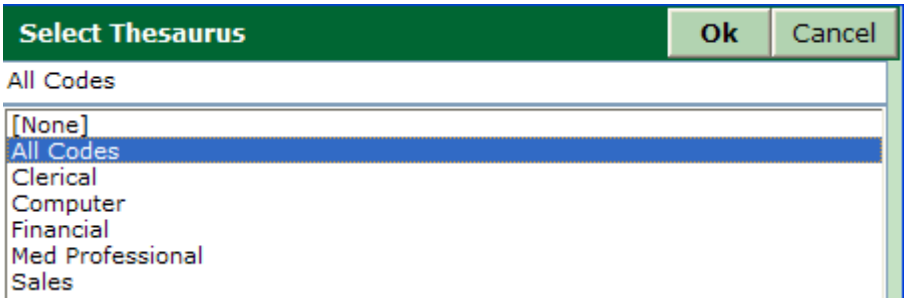
Choose Analyze to have the system find Search Criteria from the Job Description.
If the Requisition already contains Search Criteria, the User will be prompted with three choices for proceeding.


Postings Analysis -- We...
10 search criteria currently exist for this requisition. Would you like to append any new search criteria, or overwrite the existing search criteria?
Overwrite
Append
Cancel

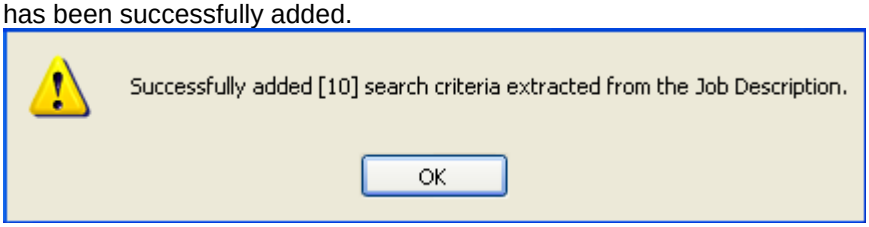
If the User chooses Overwrite the existing Search Criteria will be deleted and the newly found Search Criteria will be added. If is Append chosen, the existing Search Criteria will be retained and new criteria will be added to it. If the User selects Cancel the analyze process will be aborted.

If the User selects Overwrite or Append they will be prompted for a Thesaurus (skill set). The best Thesaurus to choose is the one that contains skill and degree codes that fit the type of Req selected.

For this example, use *All Codes.*



The system now finds Skills and Education criteria based on the codes within the system and the text it searched in the job description. You will receive a notice of how many criteria were extracted and that it has been successfully added.



The Search Criteria can now be fine-tuned to find the Applicants who best match the needs for this particular job opening.

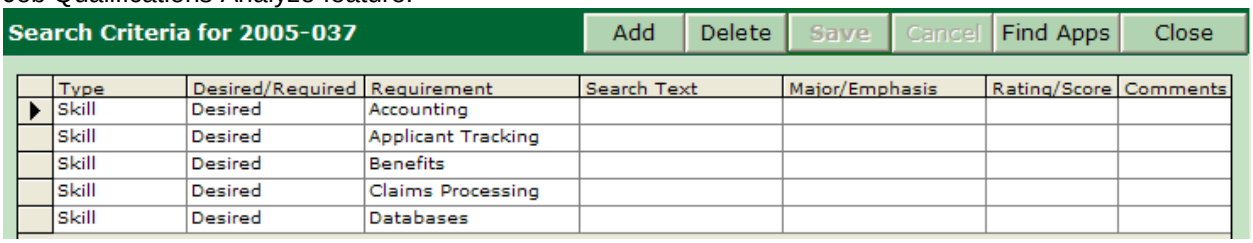
PLEASE NOTE: If no search criteria existed the User would be brought straight to the *Select Thesaurus* box.

Search Criteria

To see (and maybe edit) the criteria, choose *Search Criteria* from the *Attachments* menu.



Desired will always be the default for requirements that are populated using the Job Description or Job Qualifications Analyze feature.



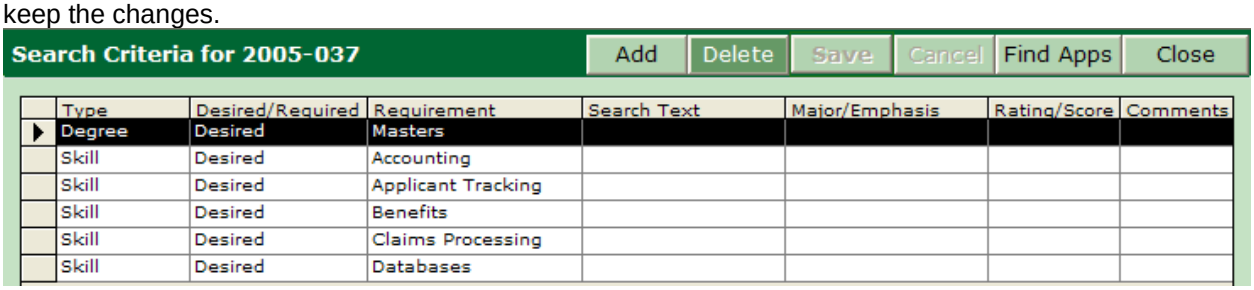
Adding Criteria

Search Criteria can also be created from scratch by using the Add button, but most Users prefer to have the system help by searching the Job Description and then modifying the Search Criteria to set exact requirements for a position.

If the User adds a criteria using the Add button, they are presented with a series of dialog boxes to select the desired values for the *Type*, *Desired/Required Rating* and *Requirement* fields. The remaining

fields (*Search Text, Major/Emphasis*, *Rating Score* and *Comments*) are entered by clicking the individual field and typing the value. The User must click the Save button to keep the changes.

Deleting Criteria
Sometimes the User may not want one of the criteria that were created from the Job Description. Highlight the line to be removed (in this case, Masters), click the Delete button then click Save to keep the changes.



Type	Desired/Required	Requirement	Search Text	Major/Emphasis	Rating/Score	Comments
Degree	Desired	Masters				
Skill	Desired	Accounting				
Skill	Desired	Applicant Tracking				
Skill	Desired	Benefits				
Skill	Desired	Claims Processing				
Skill	Desired	Databases				

Required, Desired, Nice to Have, or Must Not Have
The User can adjust the level of the criteria that remain. Click in the *Desired/Required* column of the line to be edited. Choose one of the following levels:

Required: In order to be found the Applicant must have this criterion in their record.
Desired: If the Applicant has this criterion, he/she will be rated higher in the Match column.
Nice to have: If the Applicant has this criterion, he/she will be rated in the Match column, but not as high as for Desired criteria.
Must NOT have: If an Applicant has this criterion, he/she will not be found at all.

Desired criteria are 4 times more important than Nice to have. The more match points, the higher the person appears on the list of potential candidates. Search criteria must not all be Must not Have. At least one criterion must be Required, Desired, or Nice to Have.

The example below would only select Applicants who have a *Typing* Skill. If the Applicant has a *Spreadsheet or Word Perfect* Skill, match points will be added to the Match column moving them up a bit in the list. But if the Applicant has an Accounting skill, more match points are added to the Match column, moving the Applicant even higher in the list.

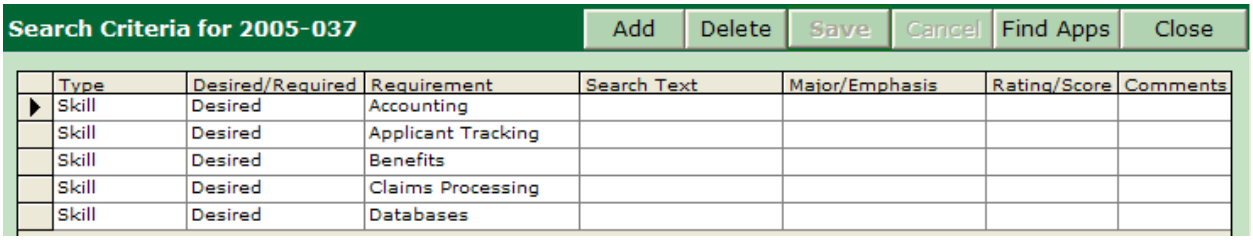
Type	Desired/Required	Requirement
Skill	Desired	Accounting
Skill	Nice to have	Spreadsheet:
Skill	Required	Typing
Skill	Nice to have	Word Perfect

Finding Applicants with Matching Criteria

Once the search criteria for a Requisition has been specified, there are several ways to locate matching Applicants depending on the User's current view.

- Find Apps button (Search Criteria form)
- Action | Find Matching Apps (*Requisition Edit View* and *Req Summary*)
- Quick launch  button (*Requisition Edit View*)

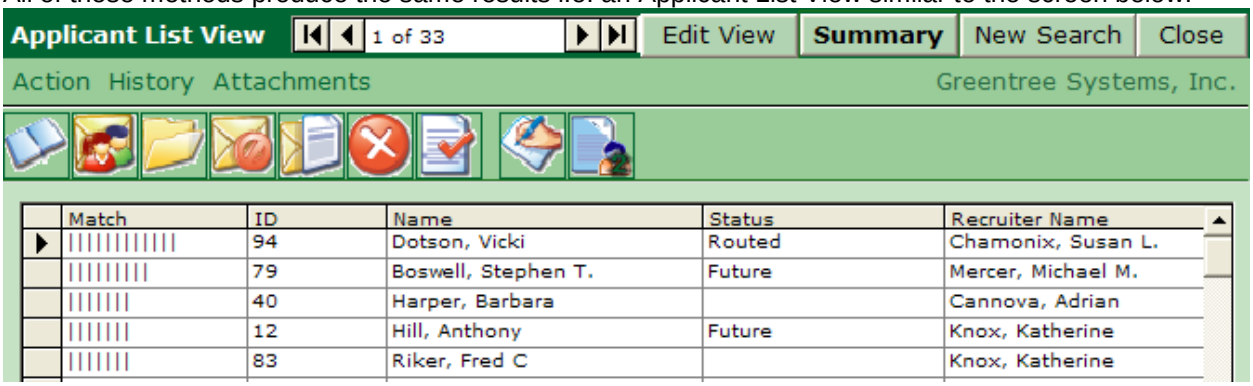
To search for qualified Applicants from the *Search Criteria* form for a specific Req, click on the Find Apps button.



Type	Desired/Required	Requirement	Search Text	Major/Emphasis	Rating/Score	Comments
Skill	Desired	Accounting				
Skill	Desired	Applicant Tracking				
Skill	Desired	Benefits				
Skill	Desired	Claims Processing				
Skill	Desired	Databases				

To search for qualified Applicants from the *Requisition Edit View* or *Summary* form, click on the *Action* | *Find Matching Apps* or select the quick launch  button located on the toolbar.

All of these methods produce the same results i.e. an Applicant List View similar to the screen below.



Match	ID	Name	Status	Recruiter Name
|||||||||||	94	Dotson, Vicki	Routed	Chamonix, Susan L.
||||||||	79	Boswell, Stephen T.	Future	Mercer, Michael M.
||||||	40	Harper, Barbara		Cannova, Adrian
||||||	12	Hill, Anthony	Future	Knox, Katherine
||||||	83	Riker, Fred C		Knox, Katherine

An Applicant whose match column is full meets all of the Search Criteria. An Applicant with fewer match points is missing one or more of the criteria. The more match points an Applicant has, the higher she/he appears on the list.

There are several other criteria that can be used to search your database. They are detailed below with general examples. You may use any combination of criteria to narrow down the search results.

Requirement Type - Skills
Most searches contain at least one or more Skills. Skill criteria can be added with combinations of Desired/Required/Nice To Have, as needed.

The Rating/Score field is used to specify the minimum skill level (0=none, 10=best). If Ratings are being used for any Skills in Applicant Attachments, a minimum *Rating may be set* here in the Search Criteria. If the Applicant has the listed Skill but at a lower Rating, the extra match point(s) will not be added. If he/she has the Skill at the Rating selected or higher, the match point(s) will be added, moving the Applicant higher in the candidate list.

Type	Desired/Required	Requirement	Search Text	Major/Emphasis	Rating/Score
Skill	Nice to have	Accounting			3
Skill	Desired	Applicant Tra			6
Skill	Required	Employee Re			10
Skill	Desired	Human Reso			6
Skill	Nice to have	Training			3

Since the default Rating for each Skill in the Applicant Attachments is zero, this will only work if Users have been entering Ratings for each Applicant who has the selected Skill.

Requirement Type - Degrees
For a *Degree*, it may be important that the Applicants have a certain *Major*. Degree finds Applicants with the specified degree or "higher". For example, Bachelors will also find Masters and Doctorate degrees. For this example, enter *Human Resources* in the *Major/Emphasis* column.

	Type	Desired/Required	Requirement	Search Text	Major/Emphasis
▶	Degree	Required	Bachelors		Human Resources

Requirement Type - Applicant Filing System
You may wish to only consider Internal Applicants for a position. To eliminate External Applicants from appearing in your results you would want to enter a criteria of *AppFilingSys, Must NOT Have,* and *External Applicants.*

	Type	Desired/Required	Requirement	Search Text	Major/Emphasis
▶	AppFilingSys	Must NOT have	External Applicants		

Requirement Type - Applicant Status
You may not want to consider Applicants who have already been eliminated from consideration on any future openings. When prompted, choose *AppStatus, InActive,* and *Must NOT have.*

	Type	Desired/Required	Requirement	Search Text	Major/Emphasis
▶	AppStatus	Must NOT have	Inactive		

Requirement Type - Result
To eliminate Applicants who have already been removed from consideration on this Requisition for the reason of wanting a *Salary* that is too high, use *Result*. When prompted, choose *Result, Reject Salary,* and *Must NOT have.*

	Type	Desired/Required	Requirement
▶	Result	Must NOT have	Reject Salary

Requirement Type - Tests
It could be helpful, if specific Tests are always given and recorded for Applicants who apply for this type of position, to only find Applicants who have taken that test. A Score can be entered, ensuring that only those Applicants who passed the test appear. When prompted, choose *Test, Computer,* and *Required.*

	Type	Desired/Required	Requirement
▶	Test	Required	Computer

If the level was set to Desired or Nice to have, only those Apps with those specific codes will get the extra match points.

Requirement Type - Text Search
There are several different kinds of Text Searches available to the User but the most common is the resume text search.

If the User wants to find search the resumes of all Applicants to find only Applicants who had experience working at a bank, the following search criteria would be added:

Requirement Type = Text Search
Rating = Required
Requirement = Resume Text
Search Text = Bank

	Type	Desired/Required	Requirement	Search Text	Major/Emphasis	Rating/Score	Comments
▶	Text Search - Resume	Desired		Bank			

The Text Search option works the same way for searching the following:

- Notes (Applicant Notes Attachment)
- Resume Text

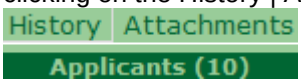
Notes and Resume Text may be long, so this type of search may take longer. Also, Scanned resumes

may have OCR errors so exact matches may not be found.

It is usually better to use additional “non-text” search criteria with a text search.

Applicant History

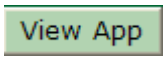
Viewing the Applicants that have applied for a Requisition is as easy as going to *Applicant* History by clicking on the History | Applicants menu item.

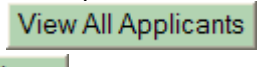


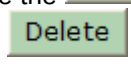
The *Applicant* History contains information about the Applicant’s Application and their status in the process.



Applicant: Name of the Applicant who is logged to the Requisition.
ID: The Applicant’s ID number.
Pre-Screen: The Applicant’s prescreen score which is determined by the answers they gave to the CSS Questions and the answer weight for those questions. An Applicant with a greater number of hash marks has answered more CSS Questions with an answer that was weighted with “Desired” and/or “Nice to Have”. Applicants who are tied to a Requisition by an iGreentree User (i.e. NOT through CSS) will have N/A in the *Pre-Screen* column as no prescreen questions would have been completed.
Reg Date: The date the Applicant was logged to the Requisition. If the Applicant applied through CSS he/she will also have a CSSForm with the same date.
TP Score: For use with iGreentree's Assessment Vendor interface; please contact Greentree for more information.
TP Intvw: For use with iGreentree's Assessment Vendor interface; please contact Greentree for more information.
Result: The Applicant’s result for this Requisition. The result may be an interim result, such as *New Applicant* or it may be a final result such as *New Hire* or *Reject Minimum Qualifications Not Met.*
Result Date: The date the result was last updated.
Result Updated By: The name of the person who last updated the Applicant’s result. If the result was assigned by the CSS it will remain blank.
App Status: Applicant’s overall status in the system.
CSS Required Docs: Indicates whether or not the Applicant has uploaded all the required documentation via CSS. If no documentation is required for this Requisition than n/a will be displayed.
Comments: An area where comments about the Applicant’s result can be recorded. Some organizations use this Comments field to track justification for the final result assigned.

The 

button can be used to open a new window and display the selected Applicant’s main record page. You can also use the 

button to open a new window and display all the Applicants in a List View. The 

button is used to remove an Applicant from the Requisition.

Post to Source Action/Postings History

Where a Requisition has been posted can be recorded using the *Post to Source* Action. The *History* of this Action is stored in *Postings* under History. These Actions and their Histories are discussed in detail in the *Sources and Expenses* Chapter of this manual.

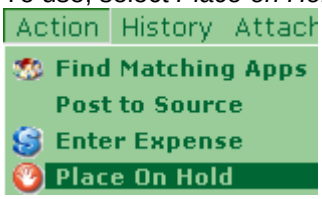
Enter Expense & Expense Distribution Actions/Expenses History

Dollars that have been spent recruiting for a Requisition can be recorded using either *Enter Expense Action* on the *Req Edit/Summary Views* or *Distribute Expense Action* on the *Req List View.* The History of these Actions is stored in *Expenses History*. These Actions and their Histories are discussed in the Sources and Expenses Chapter of this manual.

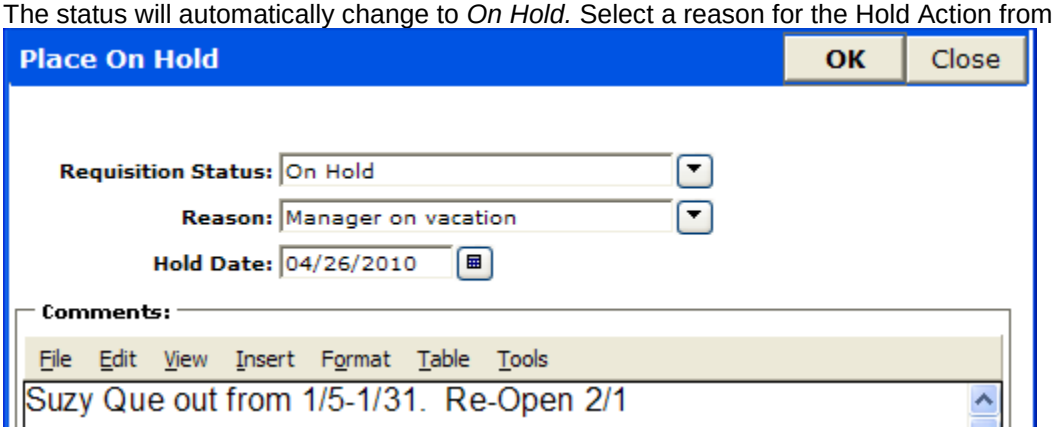
Place On Hold

Place On Hold is an important Requisition Action. If used properly, along with the *Take Off Hold* Action, it allows for more accurate time-to-fill reporting as the on hold time can be subtracted from the overall time-to-fill. The *Place On Hold* Action changes the status of the Requisition to *On Hold* which is often a defining factor for removal of Requisitions from CSS. In addition, this Action allows for recording information about why a Requisition is put on hold as well as various other details such as who requested the hold.

To use, select *Place on Hold* from the *Action m*enu.



The status will automatically change to *On Hold.* Select a reason for the Hold Action from the coded list.



Today's date will automatically fill in on the *Hold Date* field. This date can be changed if necessary by clicking on the date icon. Select the *Reason* for the hold and enter any additional information in the *Comments* field. Select 

to run the Action, placing the Req on hold. A history of this action is now stored under *Holds* on the *History* menu.

You may also run this Action by selecting the quick launch button  located on the toolbar.

Take Off Hold

The *Take Off Hold* Action works hand in hand with the *Place On Hold* Action. It will allow for the recording of the *Off Hold Date* for use in calculating time-to-fill.

Select *Take Off Hold* from the *Action* menu.



The system will default to *Open* in the *Requisition Status* field. The *Off Hold Date* field will default to today's date. If a future date is entered, the Requisition will still be switched to *Open* immediately upon completion of this Action. You cannot schedule a Req to be opened on a future date.



Select  to complete the Action.

You may also run this Action by selecting the quick launch button  located on the toolbar.

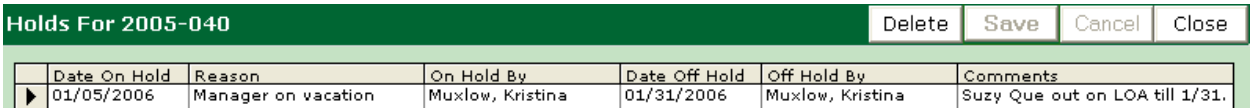
Mass Hold

Place On Hold and *Take Off Hold* actions can be run from the List View to affect a group of Requisitions all at once. They will behave the same as the single *Actions* described above, but it will put every Requisition listed on hold REGARDLESS if only one Requisition is selected. Be careful with these *Actions*, since a mistake is tedious to correct. If a date were entered incorrectly, for example, the User would have to go back to the *History* for each Req individually to correct it.

Hold History

The Hold dates and reasons are recorded in the Requisition's *Holds* History. Choose *Holds* from the *History* menu.





Withdraw

If a Req gets cancelled after recruiting has started for it, the *Withdraw Action* should be used to update all of the appropriate information in the system. The *Withdraw Action* keeps the Requisition in the database but changes its status to *Withdrawn Req* thus removing it from CSS.

To try this action, select *Withdraw* from the *Action* menu.



This Action sets the *Set Requisition Status To* and *Set App/Req Result To* fields to default values. These values can be overridden. The *Set App/Req Result To* will update the *Result* for any Applicant that is tied to this Requisition who does not already have a final result. It will overwrite transient result codes, such as New Applicant or Routed.

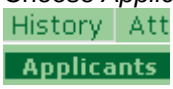


Select  to run the Action.

You may also run this action by selecting the quick launch button  located on the toolbar.

In addition to changing the *Status* of the Req, the Result of *Withdrawn Req* is added to the *History* for any candidate who did not already have a final result.

Choose *Applicants* from the *History* menu.



Applicant	ID	Pre-Screen	Req Date	Result	Result Date
Barth, Sharon	43	N/A	11/02/20C	Reject Skill	11/30/2005
Brewer, Roger	151	N/A	11/29/20C	Declined Offer	11/29/2005
Dunaway, Kathy E.	9	||||||||||||||||||	12/09/20C	Withdrawn Req	12/09/2005

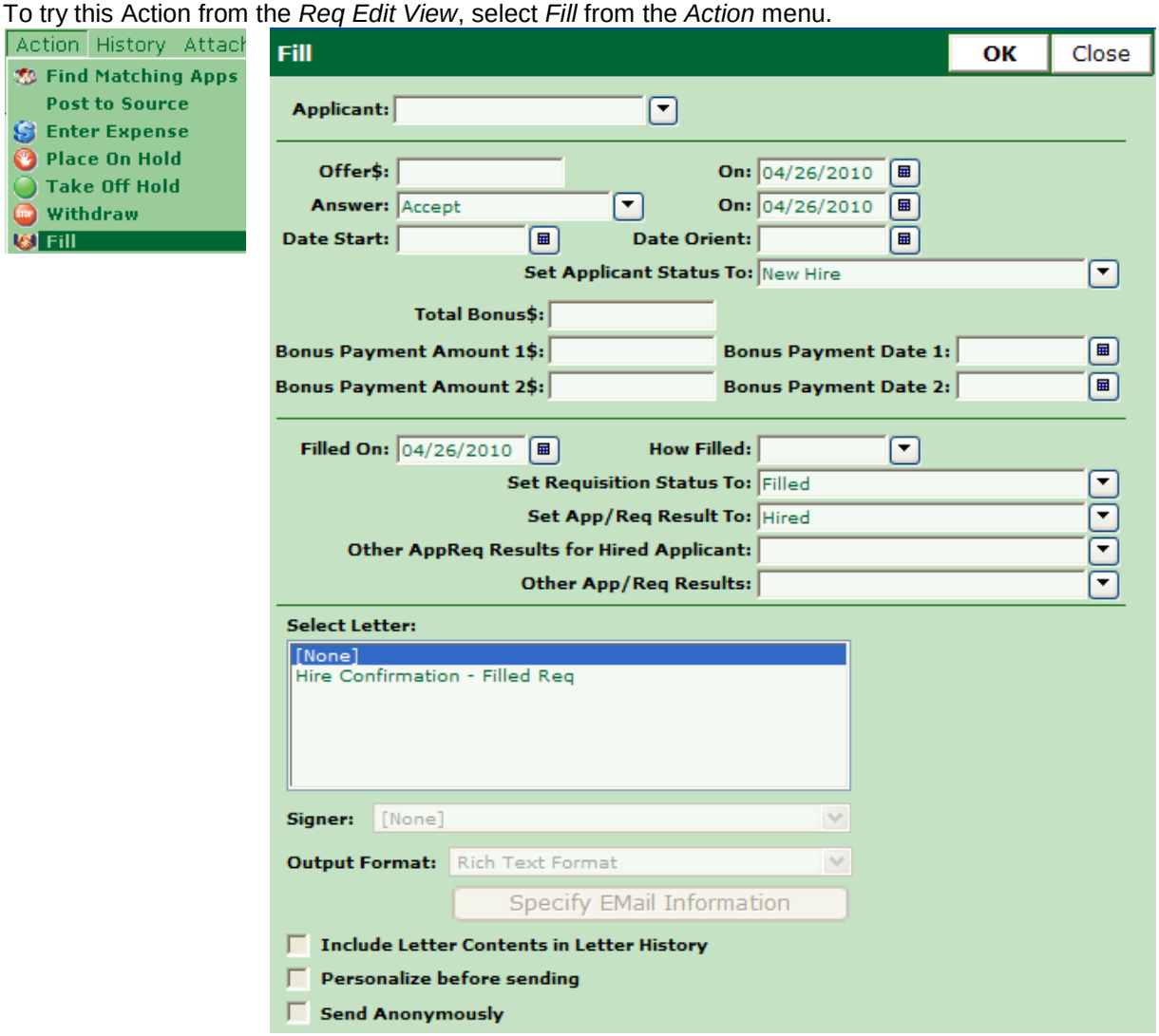
Mass Withdraw

The *Withdraw Action* can be run from the *List View* to affect a group of Requisitions all at once. This mass *Action* behaves the same way as the single action described above, but it withdraws every Requisition listed REGARDLESS if only one is selected in the list. Often this Action can only be run by the iGreentree Administrator.

Fill

In iGreentree, when an Applicant is hired the Requisition can be closed out using the *Fill* Action from the Requisition Actions, or the *Hire* Action from the Applicant Actions, to achieve the same results. Either action automatically updates the Applicant and the Req, as well as their History.

To try this Action from the *Req Edit View*, select *Fill* from the *Action* menu.



The Fill Action is just like the Hire Action, except that the Fill Action requires an Applicant (who is already logged to the Requisition) be selected to fill an Open Requisition. If there are no Applicants logged to the Req, the Action must be done from the *Applicant Hire Action*. The *Hire Action* requires the User to pick a Req and will log the Applicant to the Req if needed.

Some of the data will auto-populate, but this data can be overridden if necessary.

The system updates all of the same things that are updated when the User chooses the Hire Action from the Applicant side of the system (including History on Apps, Reqs, Sources, and Hiring Managers).

Enter data as appropriate then select 

to run the Action.

You may also run this action by selecting the quick launch button  located on the toolbar.

Offers History

The Fill Action will update the Offer History for both the Requisition and the Applicant. Choose *Offers* from the *History* menu.

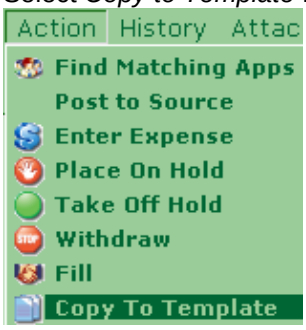


Offer Date	App Name	App ID	Answer Date	Answer	Start Date	Offer$	Bonus$
1/8/2005	Cabrillo, Yolanda	68	1/9/2005	Accept	1/28/2005	$58,500.00	$3,500.00

Copying to Template

If one or more Requisitions need to be entered into the database and they are similar to Reqs already in the existing system, the User can copy an existing Req to a Template, then use that Template to make data entries of later Reqs easier and more consistent.

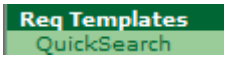
Select *Copy to Template* from the Action menu.



A window will appear for Users to enter a descriptive name for the new Template. Each Template must have a unique name. After entering the new Template name, click OK. This will create the new Template and return you to the Requisition from which it was derived.



NOTE: A Template copied from a Requisition needs to be modified so that it can be used to create new Reqs. To modify the newly created Template, perform a Req Template QuickSearch and use the Edit View feature.



Greentree recommends making the following changes to the new Template:

- Clear out the date fields, and any other fields that will not be common for future Requisitions.
- Delete and/or edit any data in the Attachments that does not apply to the new Template. (When a Template has data in the Attachments, these are copied into the new Template, too.)
- If the Template needs to be shared with other Users, click the Public button. (When a template is created it is initially a Private Template, meaning only the User who created it can see it and use it.)

There can be as many Templates as needed. Some may consist of only Attachments, such as Job Descriptions and/or Search Criteria, which are used to apply standard attachments to new Reqs after

they come in from hiring managers. Others might be used to perform mass updates of existing records. Users may have a Template for each of the standard positions that frequently are open, making data entry fast and easy. Templates associated with Job Codes may be used to pre-populate Requisitions entered in the Hiring Manager module, including Job Description, CSS Questions, etc.

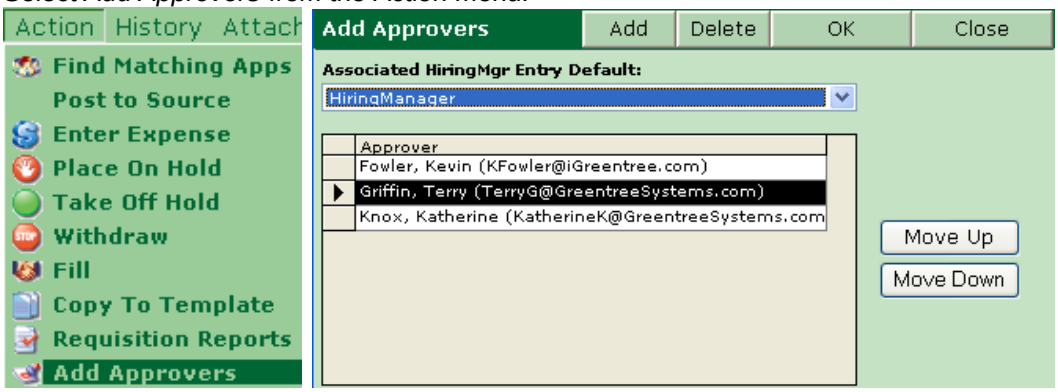
You may also run this Action by selecting the quick launch button  located on the toolbar.

Requisition Reports

Users can report on Requisitions using the *Requisition Reports* Action. Reporting on Requisitions is discussed in the *Reporting* Chapter of this manual.

Add Approvers

This Action will allow the recruiter to add approvers to a Requisition that has a Pending Approval status. Select *Add Approvers* from the Action menu.

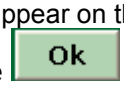


Click 

to generate the coded list of approver names. Highlight the approver and click 

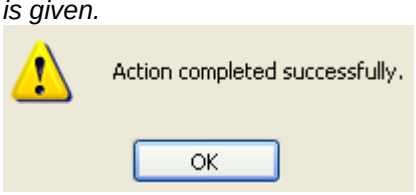
.

To add more approvers click 

again. When more than one approver is designated the User has the option to “Move Up” or “Move Down” to alter the order of the approvers. The order they appear on the list is the order they will be notified to approve. When all approvers have been added choose 

from the main *Action* window to complete the change.

When the final “OK” is selected the system will submit the additional approvers. A notification of success is given.

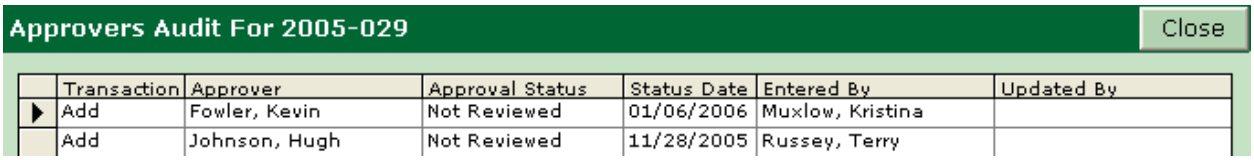


You may also run this Action by selecting the quick launch button  located on the toolbar.

Approvers Audit History

The Audit History for Approvers allows the User to review any and all approver transactions.



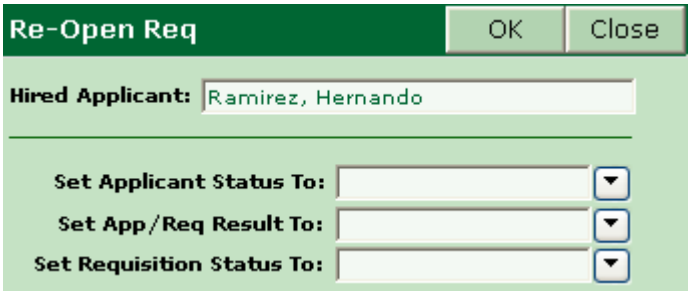


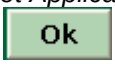
Re-Open

It may be necessary to re-open a position once it has been filled, (Applicant later declines, wrong position was filled by mistake, etc). Since the iGreentree System updates numerous pieces of information both on the Applicant and Requisition side it is necessary to use the *Re-Open* action to ensure all pieces of data are changed.

To start, select *Re-Open* from the Action menu.





First, verify that the name appearing in *Hired Applicant* is indeed the Applicant you wish to "un-hire". Next use the  button to select the new *Set Applicant Status To, App/Req Result To* and *Set Requisition Status To* fields. When complete, click  . You will receive two notification boxes before the action is completed; to continue click OK.





Several pieces of information were cleared from the Requisition Screen, including *Filled By, How Filled, Filled On* and *Start On*.

You may also run this Action by selecting the quick launch button  located on the toolbar.

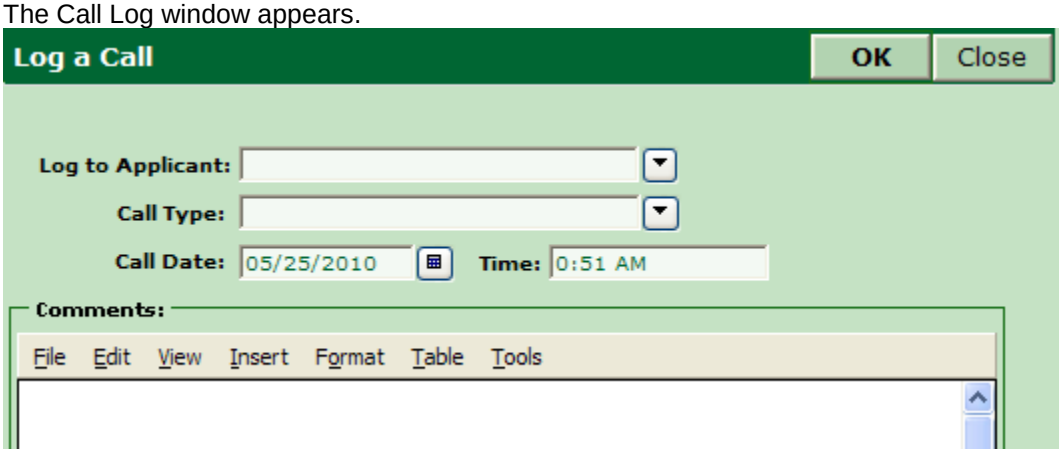
Call Log

The purpose of the Call Log is to provide a single focal point to log all communications about a Requisition and/or with an Applicant. A call log entry can be entered when reviewing a Requisition, an Applicant or an Application.

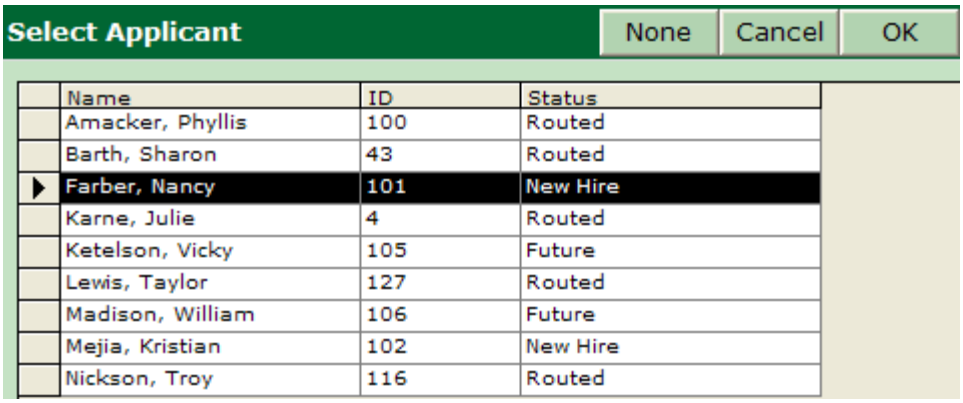
When reviewing a Requisition from the *Requisition Edit View* screen, select *Call Log* from the *Action* menu or click on the  quick launch button on the toolbar.



The Call Log window appears.



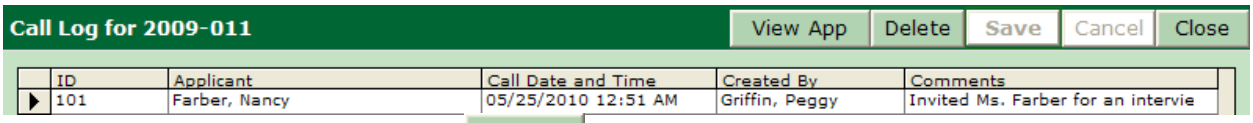
The value specified in the Log to Applicant field determines whether the Call Log is logged to the Applicant or the Requisition. To log a call to a Requisition, leave the *Log to Applicant* field blank. To log to an Applicant, click the  button in the Log to Applicant field and select the Applicant.



The Applicant can be selected from the list by clicking anywhere in the row corresponding to the Applicant and clicking OK. The User is returned to the *Applicant Edit View* screen.

To review the Call Logs, select *Call Log* from the *History* menu





To delete a Call Log entry, click on the Delete button. A Call Log entry can not be edited but can be deleted and re-entered, if needed.

CSS Questions Audit

Any changes that are made to CSS Questions are recorded in *CSS Questions Audit* History. These changes include adding questions from the Hiring Manager Module or *CSS Questions* Attachment and/or editing/deleting existing questions from *CSSQuestions* Attachment.

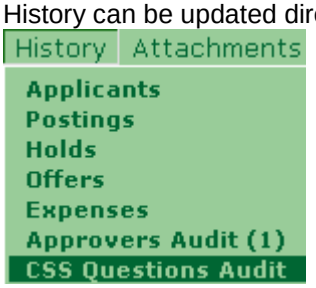

CSS Question Audit for 2005-036
Close
Description
Updated
Updated By
ADDED QUESTION [Do you pocess a certificate from an accredited nursing assistant training course 03/04/2004 04:25:27 PM Fowler, Stephanie
ADDED ANSWER [Yes], WEIGHT [Desired], DISPLAY ORDER [1], FOR QUESTION [Do you pocess a 03/04/2004 04:25:27 PM Fowler, Stephanie
ADDED ANSWER [No], WEIGHT [Must NOT Have], DISPLAY ORDER [2], FOR QUESTION [Do you pocess 03/04/2004 04:25:27 PM Fowler, Stephanie

Other Mass Actions

There are three mass actions that are not addressed in this chapter. The iGreentree Administrator normally uses *Apply Template, Change Filing System, and Purge*. If knowledge of these functions is needed, see the Administration and Maintenance Chapter of this manual and check with your iGreentree Administrator to make sure that the security levels needed for access are set.

Editing History

From List, Edit or Summary View, *History* can be viewed. Notice that although some of the fields within History can be updated directly (such as Comments); most of the data within History comes from *Actions*.



If data within History is incorrect, the User can select the incorrect line and use the *Delete* key on the keyboard to remove the entire row. Then re-use the appropriate Action to enter the correct data.

Applications in iGreentree

An Application in iGreentree is all the information associated with an Applicant that is relative to a specific Requisition. This includes not only what the Applicant submitted but all the information attached or logged to the Applicant or Requisition by the Hiring Manager or Recruiter. If an Applicant has applied to multiple job openings, then they will have multiple Applications.

Locating and monitoring Applications is easy in the iGreentree Module with the combination of the *New Applications* Dashboard item and the ability to search for Applications based on specific search criteria.

Finding New Applications

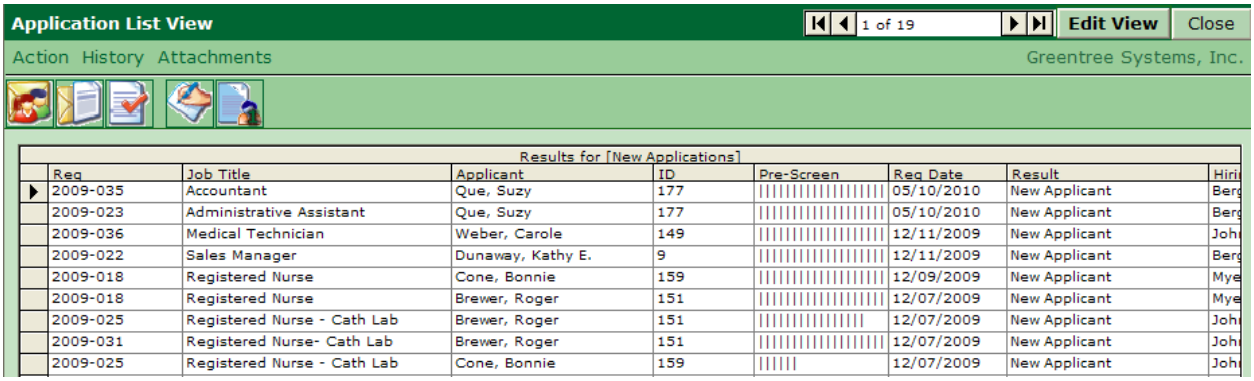
The Dashboard appears when a User first logs into iGreentree. It can also be retrieved by closing all windows that are open as a result of previous actions.

Once the Dashboard is displayed, the last item on it, under the Current Activity Summary is *New Applications*. The bar to the right of the *New Applications* text indicates the total number of New Applications. The counts can be refreshed by clicking on Refresh.


iGreentree Information Center
Current Activity Summary
Results last updated: 05/27/2010 11:49:26 AM
Refresh
New Reqs - In Approval Process (14)
Reqs Posted - Internal (12)
Reqs Posted - External (12)
Reqs Posted - Total (12)
Open Reqs (27)
Reqs with Outstanding Offer (1)
Reqs on Hold (1)
Reqs with New Applicants (9)
New Applicants (13)
New Applications (19)
Click to see the results.
Click Refresh to update the results immediately.

To view the *New Applications*, click on the QuickSearch button  to the left of the *New Applications* text. This performs a QuickSearch for all Applications where the Application Result code is 'IsNewApplicant' and the Requisition is still open.

When the QuickSearch is completed, the *Application List View* appears with a list of all the new Applications. Once an Application is reviewed by a Recruiter they typically take some Action such as schedule an interview, reject the Application or make an offer. All of the Actions change the Application Result code to something other than IsNewApplicant which removes the Application from the list on the next *New Application* search.



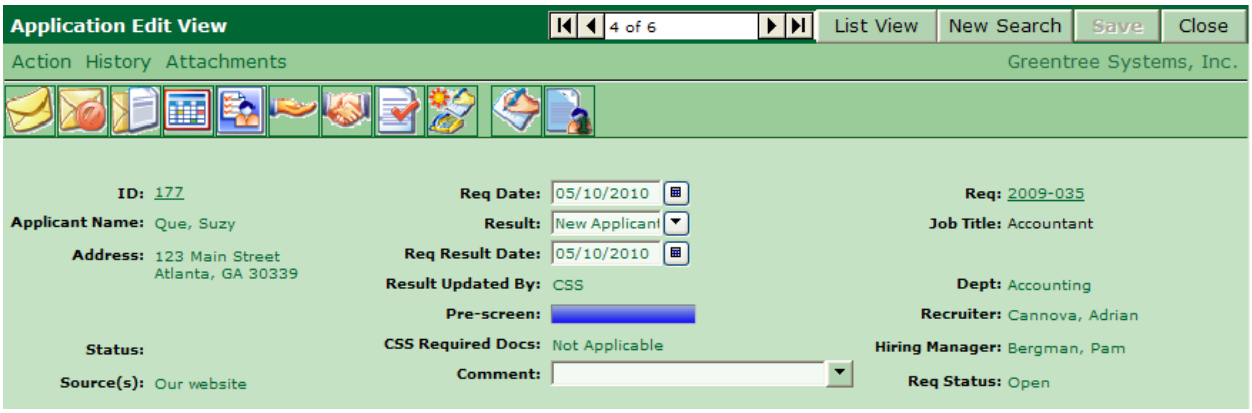
Req	Job Title	Applicant	ID	Pre-Screen	Req Date	Result	Hiri
2009-035	Accountant	Que, Suzy	177		05/10/2010	New Applicant	Berg
2009-023	Administrative Assistant	Que, Suzy	177		05/10/2010	New Applicant	Berg
2009-036	Medical Technician	Weber, Carole	149		12/11/2009	New Applicant	Joh
2009-022	Sales Manager	Dunaway, Kathy E.	9		12/11/2009	New Applicant	Berg
2009-018	Registered Nurse	Cone, Bonnie	159		12/09/2009	New Applicant	Mye
2009-018	Registered Nurse	Brewer, Roger	151		12/07/2009	New Applicant	Mye
2009-025	Registered Nurse - Cath Lab	Brewer, Roger	151		12/07/2009	New Applicant	Joh
2009-031	Registered Nurse- Cath Lab	Brewer, Roger	151		12/07/2009	New Applicant	Joh
2009-025	Registered Nurse - Cath Lab	Cone, Bonnie	159		12/07/2009	New Applicant	Joh

Application Actions

From the Application List View, all Actions are Mass Actions that apply to all the Applications in the list. These Application Actions are Applicant Actions where the specific Requisition has already been selected for each Applicant.



To display *Application Edit View*, click the  button. *Application Edit View* displays information about an Applicant where the specific Requisition has already been selected.



All *Application Actions* from the *Application Edit View* screen are Applicant Actions with a specific Requisition selected. Please refer to the *Applicant Processing* chapter for details on these Actions.



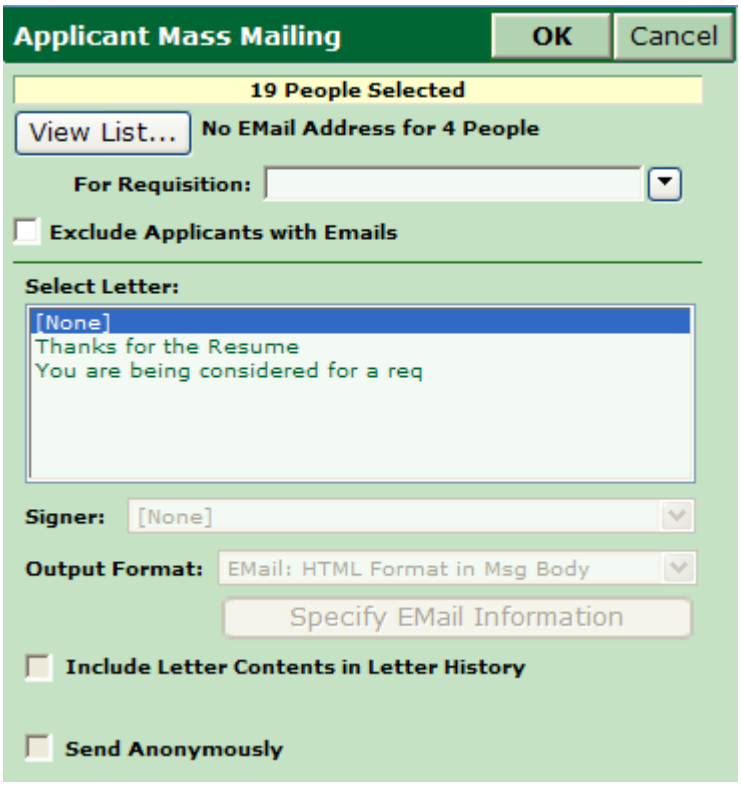
Mass Mailing

The Application *Mass Mailing* Action performs an *Applicant Mass Mailing* where the Requisition has already been selected for each Applicant.

To perform a Mass Mailing, select *Mass Mailing* on the *Action* menu or click on the quick launch button  on the toolbar.



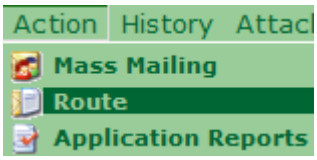
The Applicant Mass Mailing screen will appear. Refer to the *Applicant Processing* chapter describing *Mass Mailing* for details.



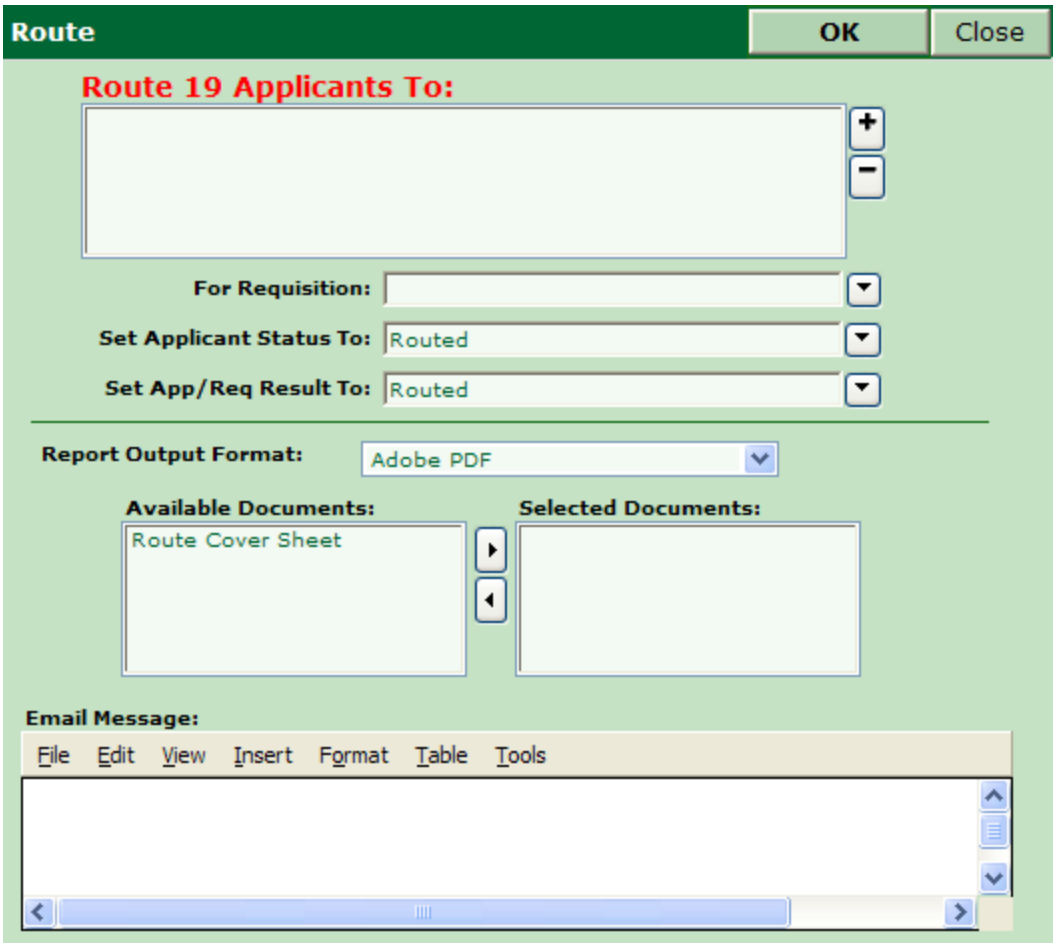
Route

The Application *Route* Action performs an *Applicant Mass Routing* where the Requisition has already been selected for each Applicant.

To perform a Mass Routing, select *Route* on the Action menu or click on the quick launch button  on the toolbar.



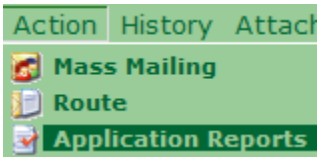
The Applicant Mass Route screen will appear. Refer to the Applicant Processing chapter describing Mass Routing for details.



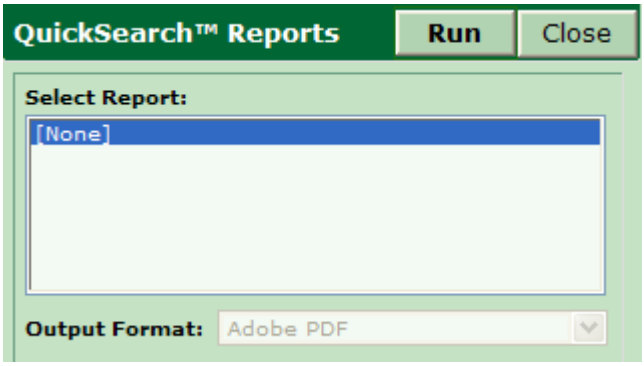
Application Reports

The *Application Reports* Action runs a search-dependent report selected by the User. The report selected always reports on the list of Applications displayed in the current Application List View.

To run an Application report, select *Application Reports* from the Action menu or click on the quick launch button  on the toolbar.



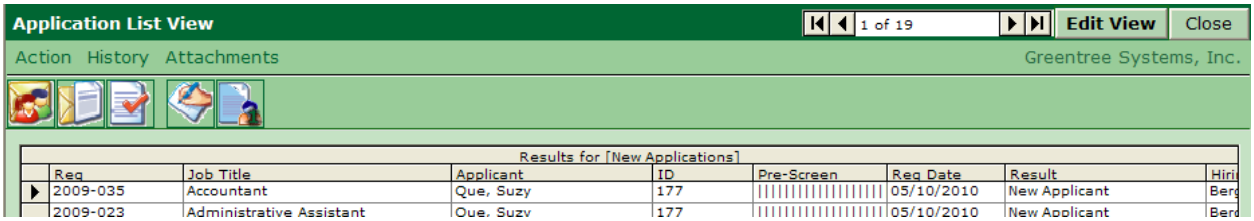
The QuickSearch Reports screen will appear. Refer to the Applicant Processing chapter describing Reporting for details.



Application History

All Application History selections apply to a single Applicant where the Requisition has been pre-selected to be the one on the Application. The Applicant selected is the one where the  indicator appears to the left of the row.

To select the desired Applicant, click on the row associated with the desired Applicant's name. Then, select one of the items from the *History* menu.

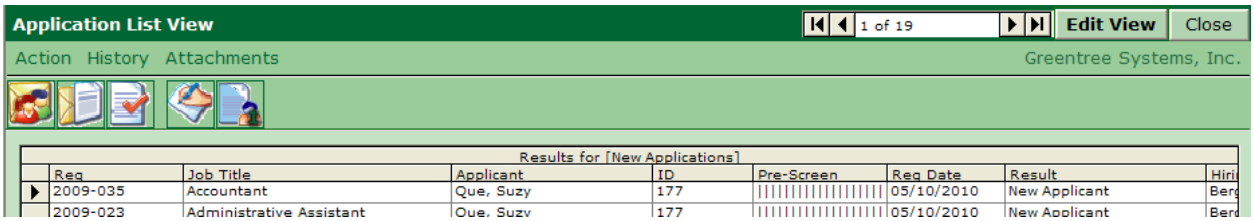




Application Attachments

All Application Attachments apply to a single Applicant where the Requisition has been pre-selected to be the one on the Application. The Applicant selected is the one where the  indicator appears to the left of the row.

To select the desired Applicant, click on the row associated with the desired Applicant's name. Then, select one of the items from the *Attachments* menu.

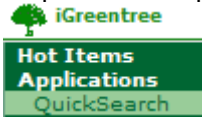




Searching for Applications

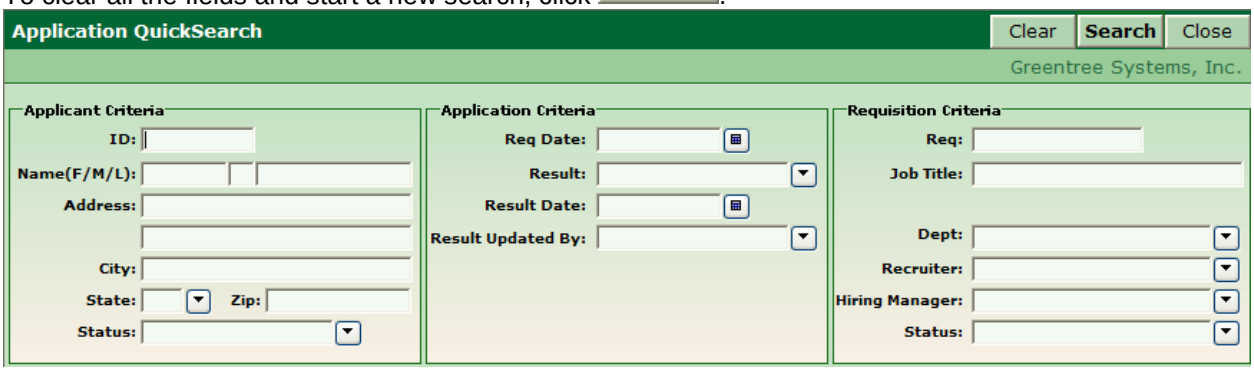
The Applications QuickSearch allows the User to specify search criteria that apply to a combination of Applicants, Applications and/or Requisitions all from a single screen, the Application QuickSearch screen.

To perform an Application QuickSearch, select *QuickSearch* under the *Applications* main menu.

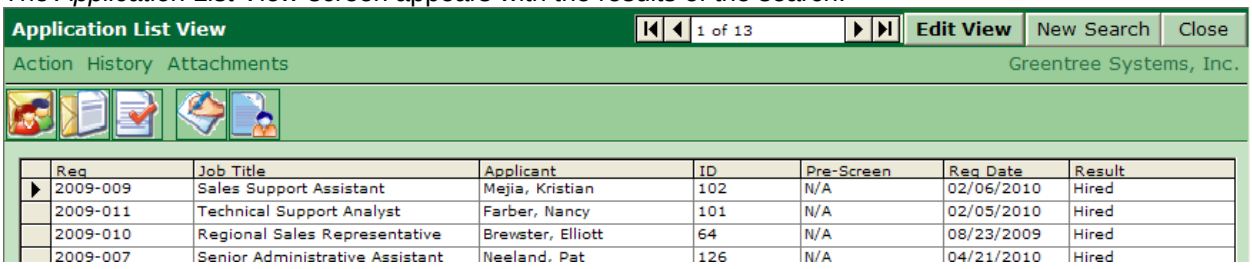


When the Application QuickSearch screen appears, enter the specific search criteria then click **Search**.

To clear all the fields and start a new search, click **Clear**.



The *Application List View* screen appears with the results of the search.



Sources and Expenses

Objectives

This chapter is for anyone who needs to enter and record Source and Expense information. After completing this chapter, the User will be able to:

- Enter Source data
- Post Requisitions to Sources
- Enter and record Expense data
- Run Source and Expense recording reports

Entering Sources/Expenses

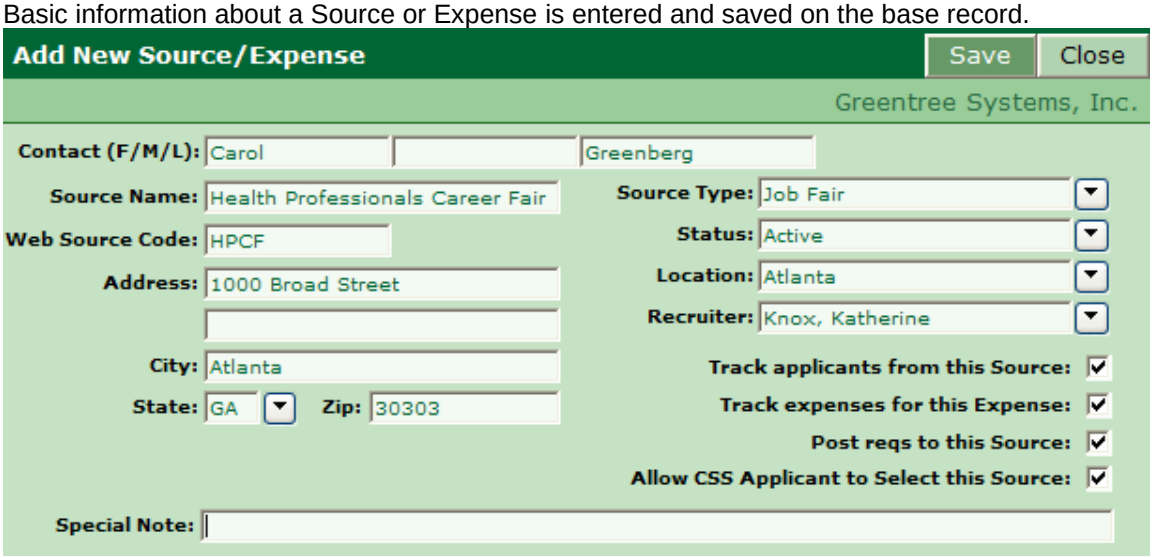
The Sources/Expenses section is used to record sources of Applicants and expenses relating to the filling of a Requisition. New Requisitions can be posted to these sources, and expenses can be recorded per Requisition to get cost per hire and other expense reporting.

Everyone in the Recruiting department should become aware of the information stored for Sources and Expenses as well as being familiar with how to utilize the information.

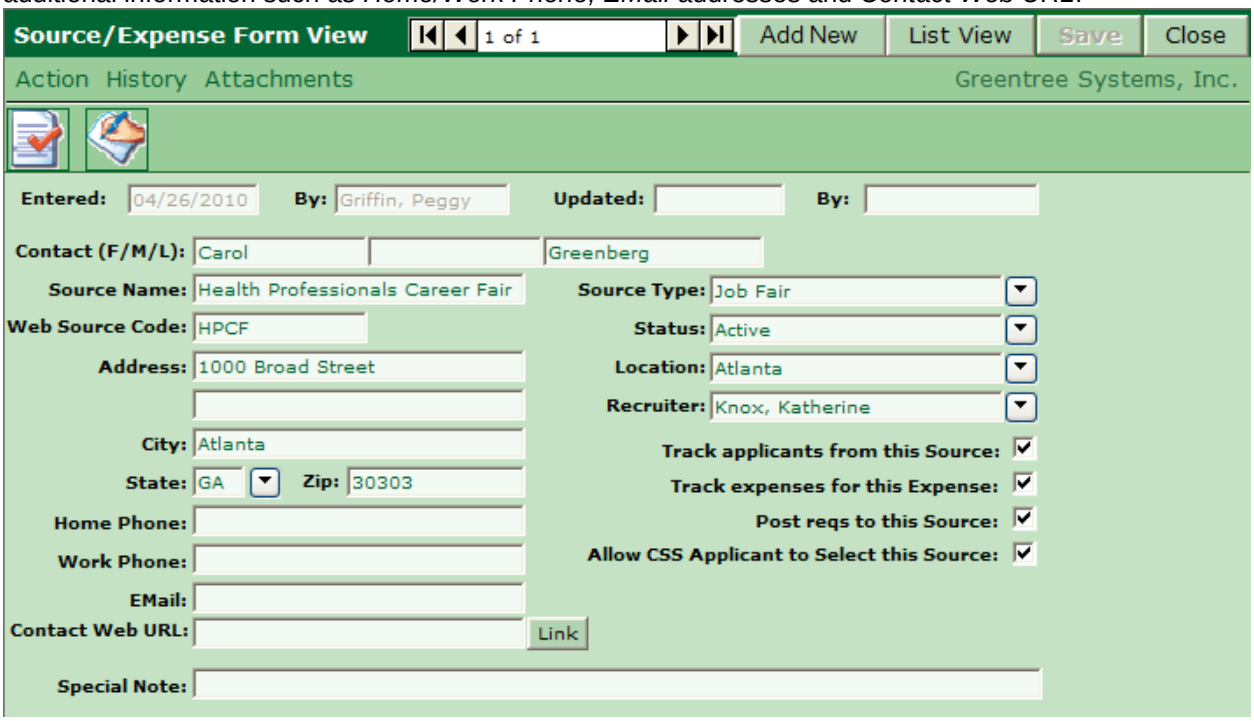
Select *Add Source* from the *Sources/Expenses* menu.



Basic information about a Source or Expense is entered and saved on the base record.



Once the initial information has been saved the Source/Expense Form View allows the User to enter additional information such as *Home/Work Phone, EMail* addresses and *Contact Web URL*.



Sources/Expenses Data

Many pieces of information may be recorded for a Sources/Expenses record. It is not necessary for all fields to be entered on a base record.

Contact (F/M/L)

This is where you can enter the name of a contact for a Source or Expense.

Source Name

This is where a specific name for the Source or Expense is identified. For example: Monster, Hire.com, New York Times, etc. If the Source/Expense is to be searchable and specifically reported on, each record needs to have the Source Name defined. Depending on how detailed the reporting needs to be, employee referrals might be handled as follows: a single source record may be created with the Source Name being 'Employee Referral,' the Contact fields being the literal name of the referring employee, and the Source Type (see Source Type for more information) defined as 'Employee.' Then when the *Log to Source* action is run for an Applicant, they can be categorized as an Employee referral type as well as being logged to the specific referring employee. Multiple 'Employee Referral' records can be created based on the level of detail required for reporting. The above described will achieve an individual employee level of reporting. If the money spent for a recruiting effort is not actually a source, a record can still be entered so that recruiting expenses can be recorded accordingly as the *Enter Expense* action is run for a Requisition.

Source Type

This is where a general category for the Source or Expense is identified. For example: Employee, Newspaper, Internet, etc. If the Source/Expense is to be searchable and generally reported on, each record needs to have the Source Type defined. A high level reporting need for employee referrals might be handled as follows: a single source record may be created with the Source Name being 'Employee Referral,' the Contact fields would be empty, and the Source Type defined as 'Employee.' Then when the *Log to Source* action is run for an Applicant, they can be categorized as an Employee referral type. The above described will achieve a basic source level of reporting.

Web Source Code
When you request that a commercial web site such as Career Builder or Monster include this code in an incoming Applicant URL the Applicant will automatically be designated as coming from that particular source. Example Web Source codes might be CB for Career Builder or MON for Monster. If the Applicant manually chooses a different source when they apply, both sources are stored for later reporting, evaluation, and reconciliation if needed.

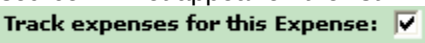
Status
The Status field is important because it shows whether the source is currently active or not. It will be used often as limiting criteria for searching and reporting. Status code values are maintained in *Maintenance | Codes | SourceStatus.*



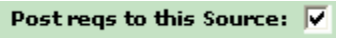
Record Applicants from this Source
If Applicants apply from this source and there is a need to record these Applicants, check this box. This will allow recording of which sources are generating the best people. If it is not checked for a particular Source, the source will not appear on the list when iGreentree Users run the *Log to Source* action for an Applicant.



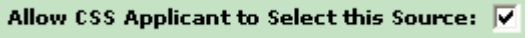
Record expenses for this Expense
If this source has costs associated with it and there is a need to record these costs, check this box. If recording the Applicants from this source (see above) is also checked, this will allow for reporting on how much was spent on each person hired from this source. If it is not checked for a particular Source, the source will not appear on the list when iGreentree Users run the *Enter Expense* action for a Requisition.



Post reqs to this Source
If open Requisition information is sent to this source, check this box. If expense recording is also checked (see above), this will allow for recording how much was spent on each Requisition that was filled from this source. If it is not checked for a particular Source, the source will not appear on the list when iGreentree Users run the *Post to Source* action for a Requisition.



Allow CSS Applicant to Select this Source
If Candidate Self-Service (CSS) Applicants are to be able to select this source when applying, check this box. If it is not checked for a particular Source, the source will not appear on the selection list when CSS Users are answering Global Questions of Question Type Source. This is only applicable to the Candidate Self-Service module. Please refer to the *CSS Maintenance* chapter for more information regarding Global Questions.



Contact Web URL
If the Source has a website it should be entered here, this allows the User to simply click the [Link] button to go to the source site itself rather than manually opening a new window first. NOTE: The URL must contain the complete path including http://.

Other Fields
It is important to make sure all Users understand how each field is to be used. The use (or non-use) of every field should be discussed within the organization to ensure data entry is consistent. Contact Information (Address, Phone, etc) is not necessary for the proper User in the iGreentree System. These fields can be used however as a central rolodex for the organization if desired. Recruiter and Location fields should only be used for reporting purposes, if necessary.

Using Web Source Tracking

After entering a unique WebSource code into iGreentree per above, the next step is for HR to contact the selected career site and provide them with the format of the link back to CSS for candidates to click on to apply for your posted positions on that career site.

Here is the format of the link for a sample career site to use:

https://abc.igreentree.com/css_external/CSSPage_Referred.ASP?Codes=CSE&Req=<reqno>

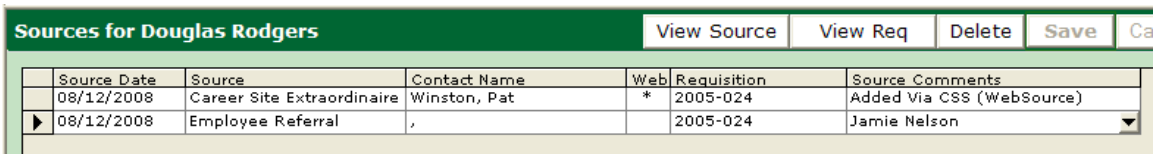
Where:

1) 'abc.igreentree.com/CSS_External' = your CSS web site URL
2) CSE = your assigned WebSource code for this career site, for example CB or MON per above
3) <reqno> = Requisition number for the posted position

When the career site implements the above link, their system will need to automatically substitute the Requisition number into the link. When the Applicant is then linked into CSS, the WebSource code from the link is captured by CSS and matched to the WebSource in iGreentree to create the record in History/Sources.

Viewing Applicant History/Sources
Source records that are created by the WebSource method are in addition to the source record created by the CSS Global Questions with Source and SourceComment question type. By storing both types of History/Sources for the Applicant, capability for tracking sources such as events or Employee Referrals can be retained while also automatically tracking referrals from career sites.

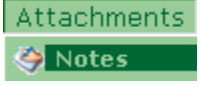
WebSource source records are flagged with an '*' in the 'Web' column, and by a comment of 'Added Via CSS (WebSource)'. This provides easy visual identification and also a method for distinguishing WebSource records in source analysis reporting.



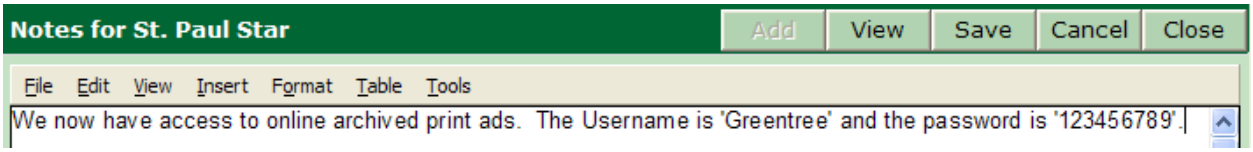
Measuring source effectiveness via iGreentree reports
Source analysis reports in iGreentree can integrate WebSource information as well as source information gathered via CSS Global Source questions. The default approach in standard Greentree reports will be to use the WebSource if it is available, and if not available then use the source selected by the Applicant in CSS, or selected by HR using the Applicant Log to Source Action, which is discussed later in this chapter.

Sources/Expenses Attachments

Notes
Miscellaneous or phone conversation information pertaining to this Source/Expense can be stored under *Attachments | Notes.* You can also access *Notes* by clicking on  located on the quick launch toolbar.



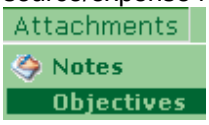
Select the *Add* button to enter a note:


Notes for St. Paul Star
Add
View
Save
Cancel
Close
File Edit View Insert Format Table Tools
We now have access to online archived print ads. The Username is 'Greentree' and the password is '123456789'.

The window will scroll as additional notes are entered. This information is then accessible to everyone with access to Source/Expense Notes. When *Save* is selected, the User's name, (server) date and time of the note entry, will automatically be added to the note.

Objectives

Use *Objectives* to record the type of job(s) or Applicants that the source specializes in, this may be helpful in reporting for your Organization. Select *Attachments* / *Objectives* to add an Objective for a source/expense record.



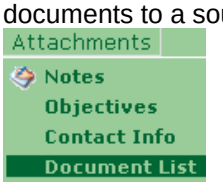
Contact Information

Additional phone numbers and email addresses can be recorded for Sources. This additional information may be helpful for reaching the Source when they are not available from the data found on the base record. Select *Attachments* / *Contact Info* to add additional contact information.



Document List

Documents can be stored for Sources/Expenses. Examples of documents often retained here include Agency Contracts, Posting Forms, and Invoices. Select *Attachments* / *Document List* to *View* or *Add* documents to a source/expense record.



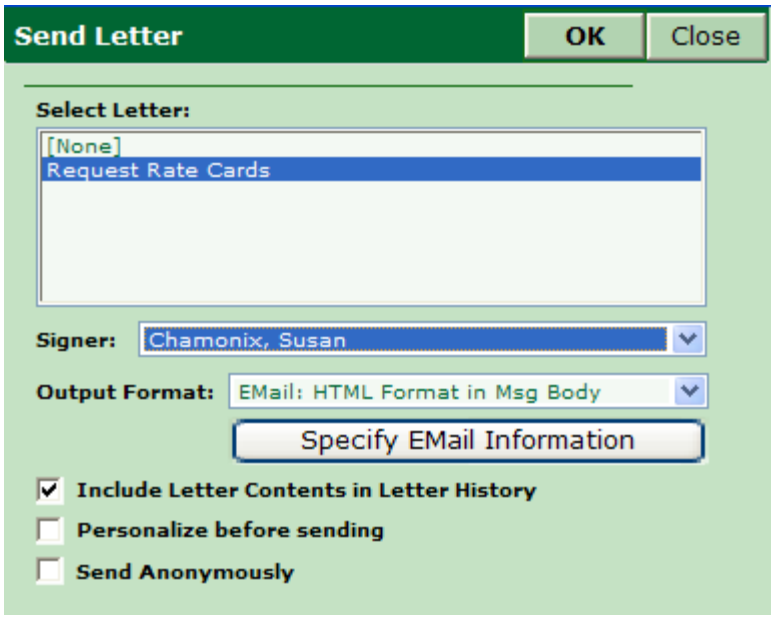
Sources/Expenses Actions/History

Send Letter

Letters that are to be sent to a source and recorded in iGreentree can be printed on paper if the physical address is known, or sent via email if an email address is available and entered on the source base record.

Select *Send Letter* from the *Action* menu.





Select the Letter to send to the Source. If an email address is available, the *Specify Email Information* option will be enabled, otherwise a hard-copy of the letter is the only option. If a complete copy of the letter is to be saved for the source, *Include Letter Contents in Letter History* should be checked. This will attach a text copy of the letter to the source record. Additionally, if there is a modification to the standard letter that needs to be made, *Personalize before sending* should be checked.

The Send Letter action is recorded in *Letter* History for each Source.



NOTE: This Action is similar to the *Send Letter* Action for *Applicants*. Refer to the *Send Letter* section of the *Applicant Processing* Chapter for details. The *Send Letter Action will only list letters identified as* Source Send Letter *in* Maintenance | Letters*. Additional letters can be added via* Maintenance | Letters*.*

Source/Expense Reports

Although some Source/Expense reports can be found in *ReadyReports*, standard reports that are used in the Sources/Expense part of iGreentree are *Search Dependant* and require a search be performed to identify the data set from which the report should represent.

Select *Source Reports* from the *Action* menu or you may run this Action by selecting  located on the quick launch toolbar.



NOTE: Typically this Action is run in the *List View,* it can however, be run as an Action for a single Source in *Form View.*



Other Actions for Sources/Expenses

Purge is normally used by the iGreentree Administrator to permanently remove inactive records that are no longer needed. This can be done by selecting *Purge* under the Actions menu (located only in List View), or the User may select  located on the quick launch toolbar.

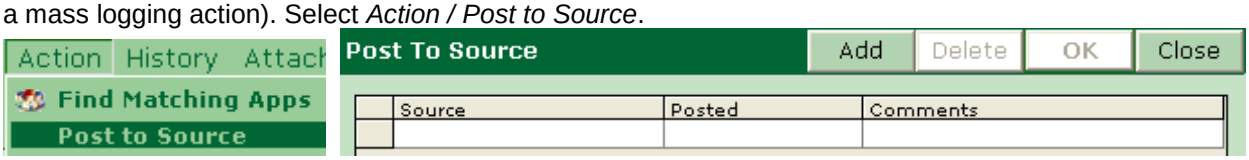
Enter Expense, Distribute Expenses and *Log Applicant* will be discussed later in this Chapter.

Requisition Actions for Sources/Expenses

There are Actions for Requisitions that relate to Sources/Expenses: *Post to Source* and *Enter Expense*.

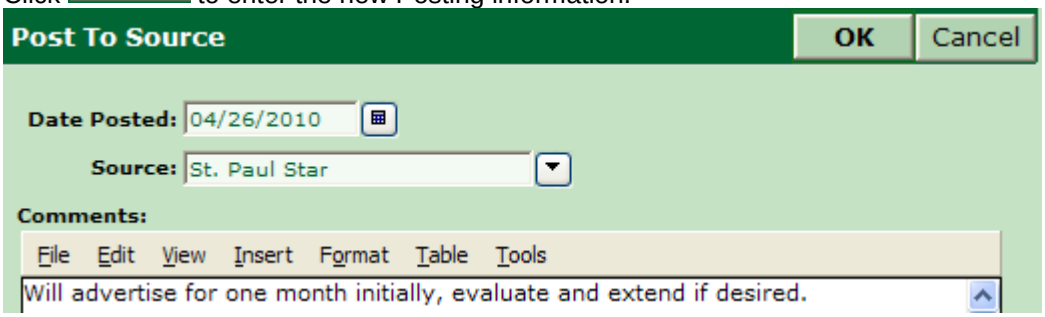
Post to Source

To record where a Requisition has been posted, use the *Post to Source* Action. Before running this action, be sure the Requisition is in *Form* or *Summary View*. (Running the action in *List View* will perform a mass logging action). Select *Action / Post to Source*.



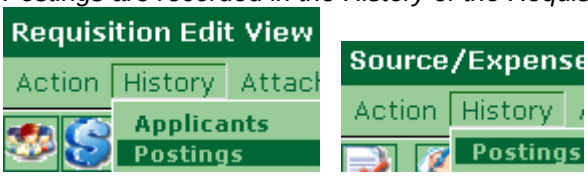
Click 

to enter the new Posting information.



Put the details for this posting in the Comments *field.*

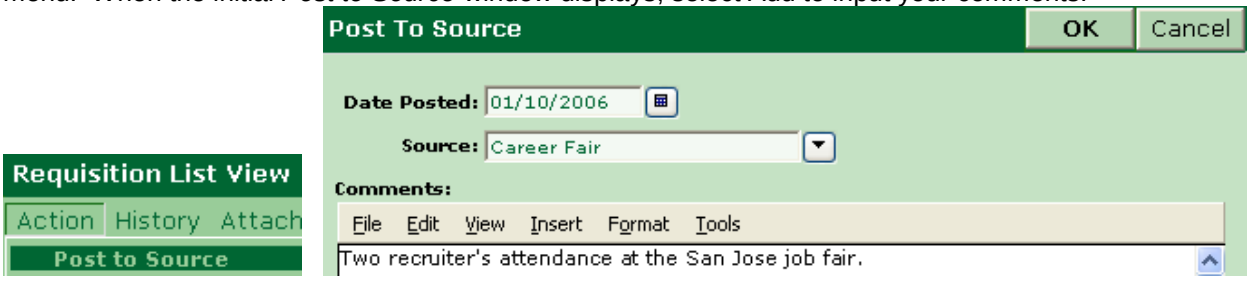
Postings are recorded in the History of the Requisition, as well as the History of the Source.



Mass Post to Source

If a posting applies to more than one Requisition, the Post to Source action should be run in 

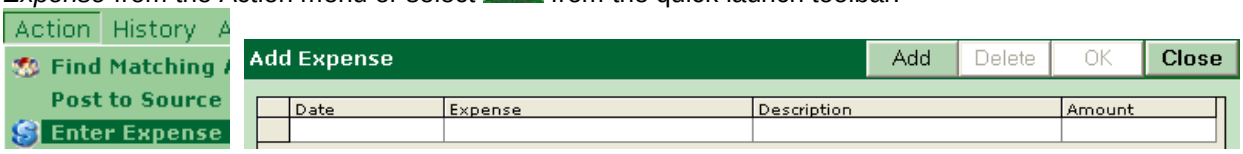
, where action results will apply to all of the Requisitions currently displaying in the list. To enter a Posting that is for ALL of the Reqs displayed in *List View*. Select *Post to Source* on the *Action* menu. When the initial *Post to Source* window displays, select Add to input your comments.



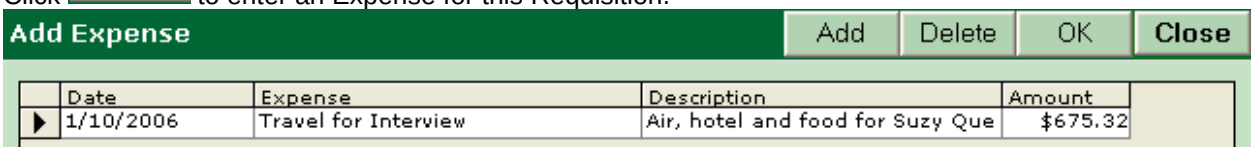
History is recorded as described above.

Entering Expenses

iGreentree can help record expenses related to monies being spent to fill Requisitions. Select *Enter Expense* from the Action menu or select  from the quick launch toolbar.



Click  to enter an Expense for this Requisition.



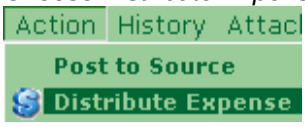
The *Date* field will default to the current date; however a User may click into the *Date* field and select a different date if needed.

Date: The date the cost was incurred.
Expense: The name of expense. Record any type of expense, such as advertisements, job fairs, travel expenses, agencies, etc.
Description: A detailed description of the particular expense.
Amount: The dollar amount of the expense.

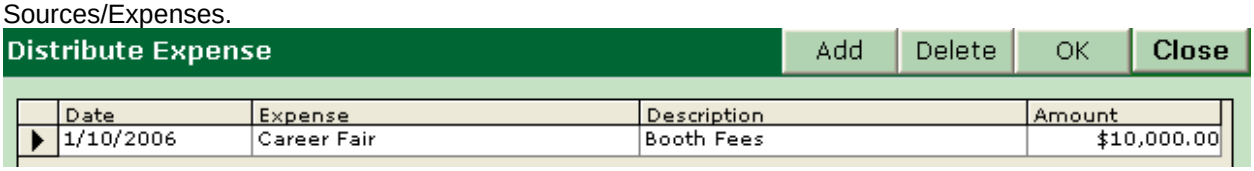
Expense Distribution

If an Expense applies to more than one Requisition, enter the Expense from  , where the expense will be equally divided among ALL of the Requisitions in the displayed list.

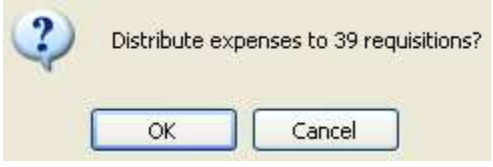
Choose *Distribute Expense* from the Action Menu, or select  from the quick launch toolbar.



Enter the Expense that is for ALL of the Requisitions. Enter the data similar to the single action, but with the full dollar amount to be equally divided among all of the Requisitions. The system will record the information in the Expense History for Requisitions, as well as the Expense History for Sources/Expenses.



After clicking *OK*, a confirmation window will display. Select *OK* after verifying the distribution is correct.



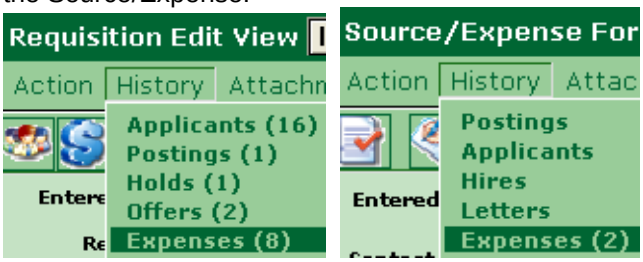
View History for one of these Requisitions to assure that the cost was split correctly. Look at the *Expenses* History for any one of the Reqs listed.

NOTE: An Expense Distribution *can be performed across multiple Sources as well. If the expense is to be recorded and distributed across select Sources and is not Requisition specific, bring the list of sources into* List View *and run the* Distribute Expense *action under Sources/Expenses.*

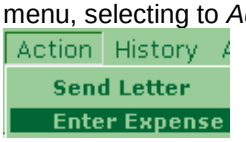


Expense History

This information is recorded in the *Expenses* History for Requisitions, as well as the *Expenses* History of the Source/Expense.



NOTE: Entering an expense from the Source/Expense window can also be done if the particular expense doesn't apply to a particular Requisition. To do this, run the *Enter Expense* action from the Source Action menu, selecting to *Add*, and so forth as described above.



Applicant Actions for Sources/Expenses

The only Action for Applicants that relates to Sources/Expenses is *Log to Source*.

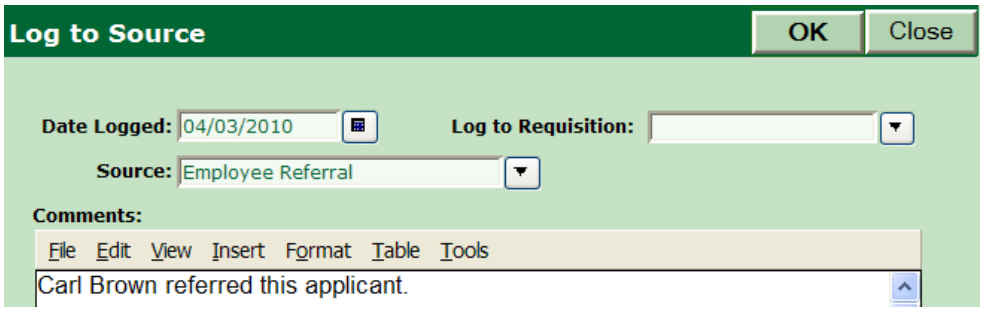
Source Recording

The Source that each Applicant came from can be recorded in iGreentree, if CSS has been purchased the Source is automatically logged when the Application is submitted. For paper Applications you would need to use the following action.

Log to Source

Select *Log to Source* from the *Action* menu or select  from the quick launch toolbar.





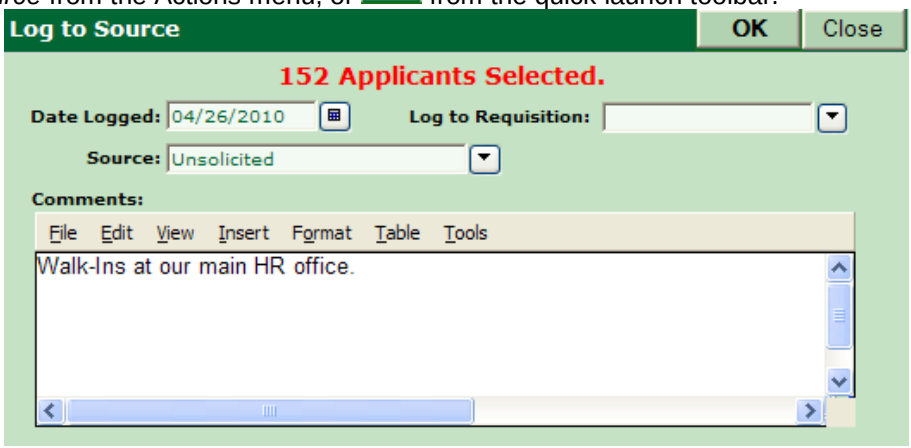
If you know the Requisition you may select it here. This will log the Applicant to the Requisition, if they are not already logged to it, and then record their source for that Requisition. See 'Log to Req' for more information about logging Applicants to Requisitions.

The default date (today) can be used as is or changed as needed. Select the Source code from the select list. Use the *Comments* field to include additional information about this particular Source. For this example, the Source is *Employee Referral*, so we put the employee's name in *Comments.*

Mass Log to Source

Suppose a large group of Applicants came from the same Source, with these Applicants displayed in *List View*, select *Log to Source* from the Actions menu, or  from the quick launch toolbar.



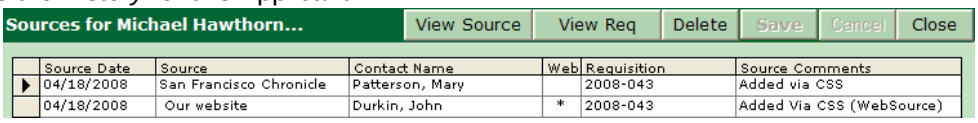


Remember that this information is stored in both the *Applicant* History (Sources) and the *Source* History (Applicants and Hires). *This is just like the single Log to Source action, except that ALL of the Applicants are being logged all at once.*

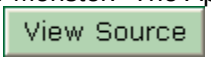
Sources History

The Source is added to the *History* for this Applicant

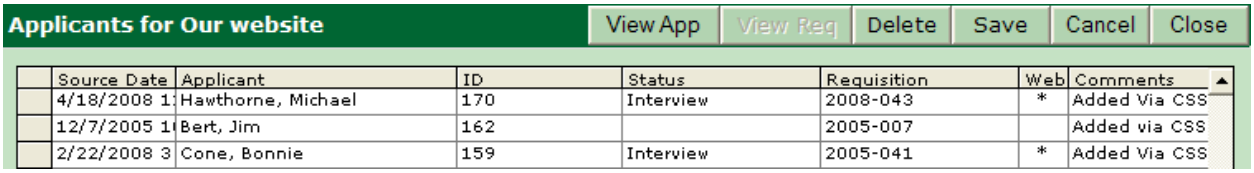




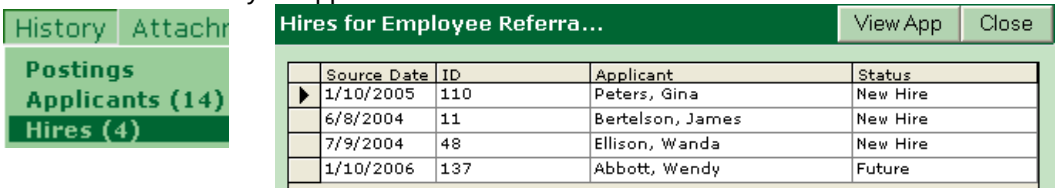
The 'Web' column indicates whether or not this Applicant came thru an outside, 3rd party website, such as Career Builder or Monster. The Applicant was also added to the *History* for this Source at the same time.

To view, choose  from the History window. From the Source window choose *Applicants* from the *History* menu. The Applicant that we just logged to this Source should now be somewhere in the list.





There is also a History of Applicants from this source that were Hired.



Candidate Self-Service

Objectives

This chapter is for anyone who will be allowing Applicants to enter themselves via the Candidate Self-Service (CSS) module. After completing this chapter, Users will be able to:

- Understand how to configure, maintain, and use the CSS module
- Find Applicants and candidates entered via CSS
- Identify the relationship between the CSS Profile and the data fields on the candidate record

What is Candidate Self-Service?

Candidate Self-Service (CSS) provides Applicants with real-time access to search, view, and apply for existing job openings and to optionally monitor their own progress through your employment process. It further allows them to receive automated notification of future openings of specific interest to the candidate. CSS stores Application-like information in a 'Profile' that can be viewed and maintained by the candidate to ensure currency and accuracy of the data. The Profile information is merged into a Requisition-specific Application (CSSForm) for each job applied for avoiding the need to complete multiple Applications.

Applicants access CSS using a standard web-browser. Companies typically provide a link to CSS from their internet website (Career Site) so that external Applicants can apply from anywhere that has internet access. Oftentimes companies will elect to implement an additional CSS career site for use by internal Applicants. If an internal CSS is created, it can be linked to the company's internet and/or intranet site. In addition, companies may provide both internal and external Applicants with internet access to the various CSS career sites via a kiosk PC located within one of their offices.

Welcome Page

The *Welcome* page is the first page of CSS seen by an Applicant when they arrive at your career site. It is used to introduce Applicants to the site and to describe the options for using CSS. The page may contain assistance which can be as simple as providing brief descriptions of the various functionality, furnishing links for submitting a resume, providing links to browser downloads, and/or links to other areas of your corporate site.


Greentree Systems, Inc.
Welcome
Find Jobs
Sign In
Welcome to the Greentree Systems Employment Center
New Applicants
Without logging in you can:
Browse our open jobs
Refer a friend to a specific job
Signing in allows you to:
Apply and check the status of your applications
Get emailed 'Job Alerts' for jobs of interest to you
Find Jobs
Create a UserID/Password
If you do not have an email account, please create one:
Microsoft Hotmail: http://www.hotmail.com
Yahoo Mail: http://mail.yahoo.com
Google Gmail: http://gmail.google.com
Search by Job Number:
Find Job
Previous Applicants
By logging in, returning applicants can view the status of their applications, as well as search new job openings and apply online
Login
Email Address or User ID:
Password:
Login
Forgot Password?
This web application requires a browser that supports JavaScript, Tables, Cookies and Frames. If your browser does not support these attributes, you may download your desired choice of browsers at the right.
Internet Explorer
mozilla Firefox
Powered by iGreentree

The Applicant can navigate the pages of CSS by using the links in the page header or they can use the embedded links in the page.



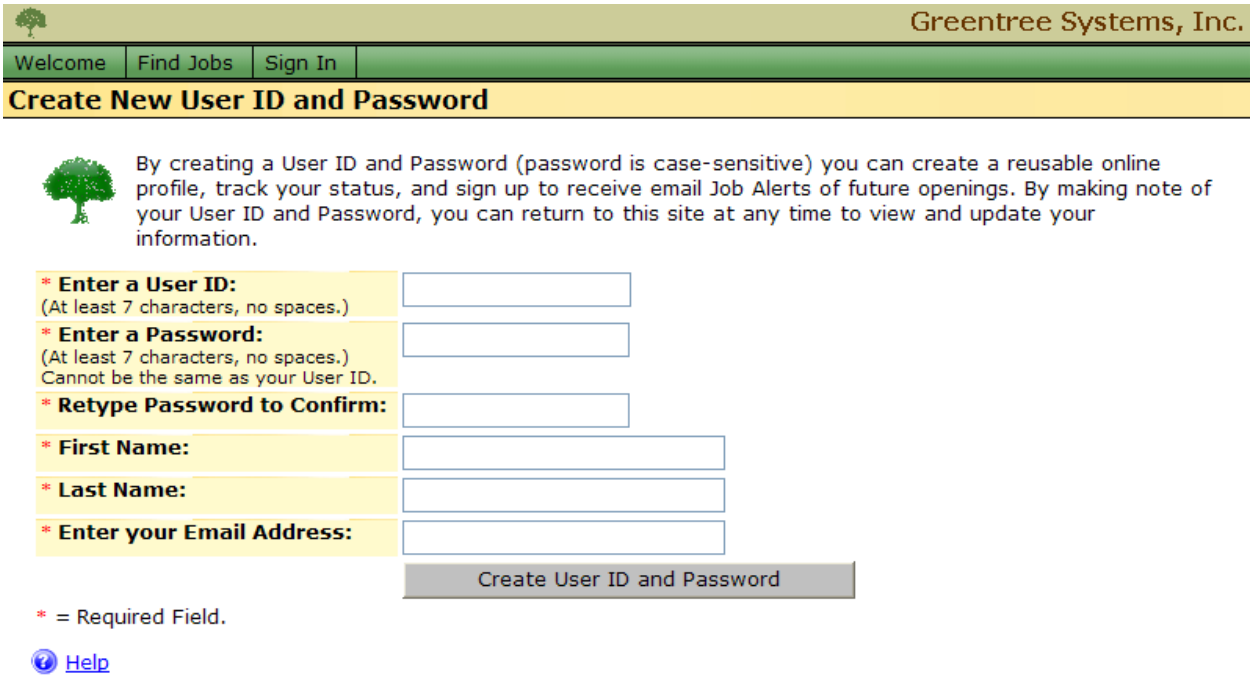
or **Find Jobs**
Create a UserID/Password

A new Applicant has two paths to choose from when getting started. They can create a User ID and Password that will allow them to apply for specific positions or choose to begin reviewing job opportunities as a guest.

Create New UserID and Password

If the Applicant chooses to create a UserID and Password they can do so by clicking the link **Create a UserID/Password** at the bottom of the *Welcome* page. The *Create New UserID and Password* page requires the Applicant to create a User ID that is a minimum of 7 characters long (without spaces) and a Password that is at least 7 characters long (without spaces). The Applicant's Password cannot be the same as their User ID. The fields marked with an * are required fields that must be

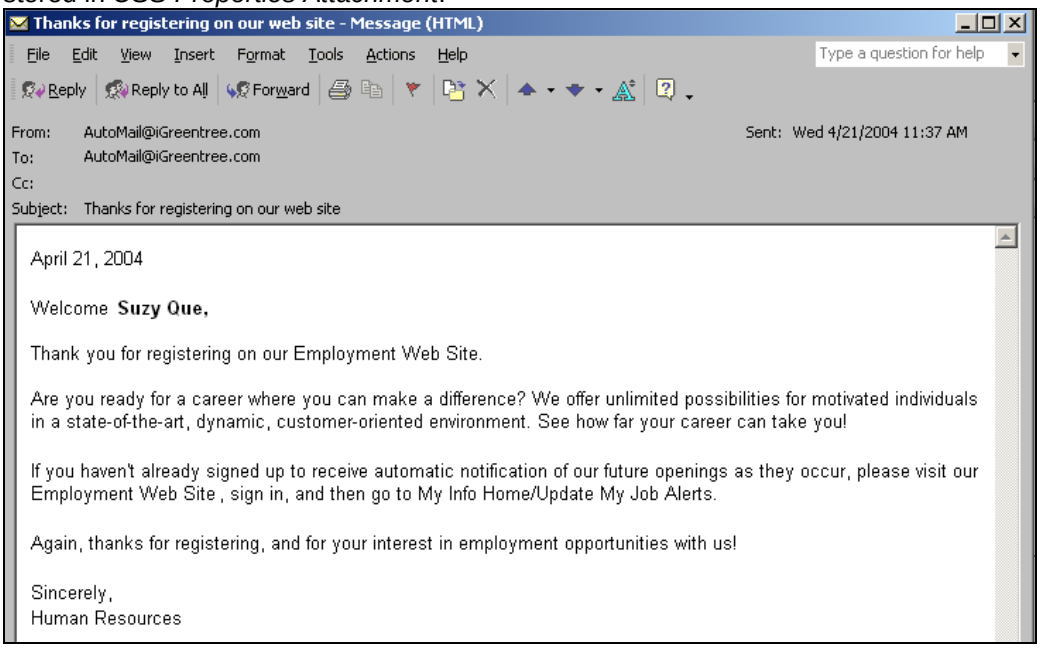
completed. The email address may be optional as determined by the customer in a CSS Maintenance setting). After completing the required information, the Applicant must click the Create UserID and Password button to proceed.


Greentree Systems, Inc.
Welcome
Find Jobs
Sign In
Create New User ID and Password
By creating a User ID and Password (password is case-sensitive) you can create a reusable online profile, track your status, and sign up to receive email Job Alerts of future openings. By making note of your User ID and Password, you can return to this site at any time to view and update your information.
* Enter a User ID:
(At least 7 characters, no spaces.)
* Enter a Password:
(At least 7 characters, no spaces.)
Cannot be the same as your User ID.
* Retype Password to Confirm:
* First Name:
* Last Name:
* Enter your Email Address:
Create User ID and Password
* = Required Field.
Help

Upon successful submittal they will be forwarded to a revised *Welcome* Page that contains options for proceeding.

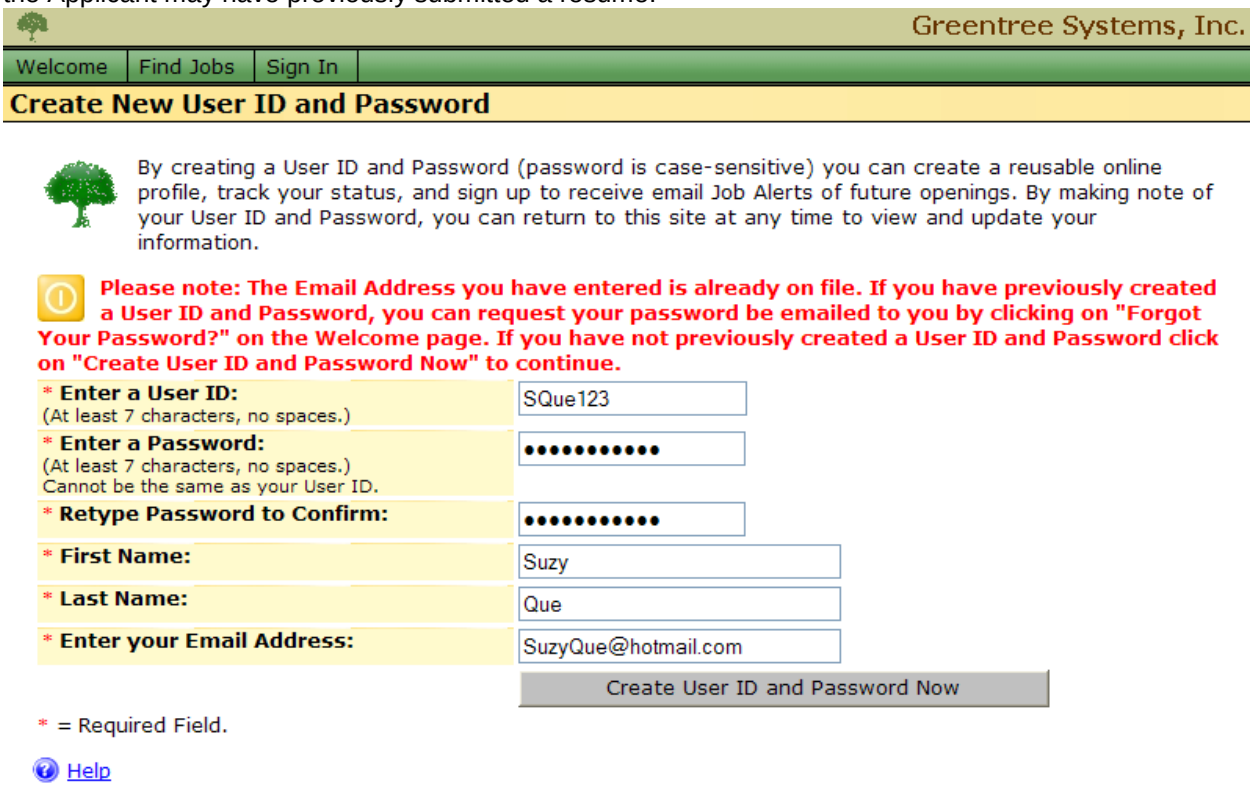

Greentree Systems, Inc.
Welcome
My Home Page
Find Jobs
My Profile
Application Status
Job Alerts
Sign Out
Welcome to the Greentree Systems Employment Center
Welcome Suzy.
If you are not Suzy, please click here.
You are now signed in to our Career Opportunities site and can:
Create or update your online profile
View and apply for open jobs
Email a friend with information about any open job
View the status of applications that you have submitted
Create or edit your criteria for receiving email 'Job Alerts'
My Profile
Find Jobs
Application Status
Job Alerts
Search by Job Number:
Find Job
Powered by
iGreentree

The Applicant will also receive an emailed message that thanks him/her for registering with the Career Site. They have now created an Applicant record in iGreentree. The User Name information will be stored in *CSS Properties Attachment*.


Thanks for registering on our web site - Message (HTML)
File Edit View Insert Format Tools Actions Help
Type a question for help
Reply Reply to All Forward
From: AutoMail@iGreentree.com
Sent: Wed 4/21/2004 11:37 AM
To: AutoMail@iGreentree.com
Cc:
Subject: Thanks for registering on our web site
April 21, 2004
Welcome Suzy Que,
Thank you for registering on our Employment Web Site.
Are you ready for a career where you can make a difference? We offer unlimited possibilities for motivated individuals in a state-of-the-art, dynamic, customer-oriented environment. See how far your career can take you!
If you haven't already signed up to receive automatic notification of our future openings as they occur, please visit our Employment Web Site , sign in, and then go to My Info Home/Update My Job Alerts.
Again, thanks for registering, and for your interest in employment opportunities with us!
Sincerely,
Human Resources

If the Applicant's email address or UserID, already exist in the iGreentree database, a system message will be generated. This may occur if the Applicant's information is in the database from a previous

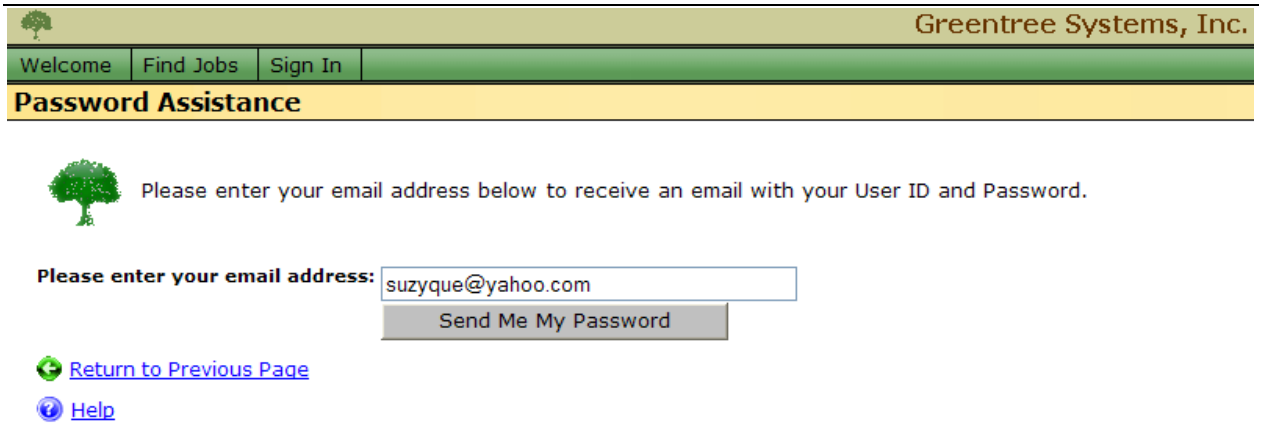
Application submittal. It is also possible that the Applicant was entered manually by someone in HR or the Applicant may have previously submitted a resume.


Greentree Systems, Inc.
Welcome
Find Jobs
Sign In
Create New User ID and Password
By creating a User ID and Password (password is case-sensitive) you can create a reusable online profile, track your status, and sign up to receive email Job Alerts of future openings. By making note of your User ID and Password, you can return to this site at any time to view and update your information.
Please note: The Email Address you have entered is already on file. If you have previously created a User ID and Password, you can request your password be emailed to you by clicking on "Forgot Your Password?" on the Welcome page. If you have not previously created a User ID and Password click on "Create User ID and Password Now" to continue.
* Enter a User ID:
(At least 7 characters, no spaces.)
SQue123
* Enter a Password:
(At least 7 characters, no spaces.)
Cannot be the same as your User ID.
* Retype Password to Confirm:
* First Name:
Suzy
* Last Name:
Que
* Enter your Email Address:
SuzyQue@hotmail.com
Create User ID and Password Now
* = Required Field.
Help

The Applicant may need to contact the Human Resources department for assistance if no email address exists on the duplicate record (i.e. error was caused by a duplicate UserID or Password). However, if it is a simple case of forgetting the UserID and Password previously created, the Applicant can request the password be sent to them via email as described below.

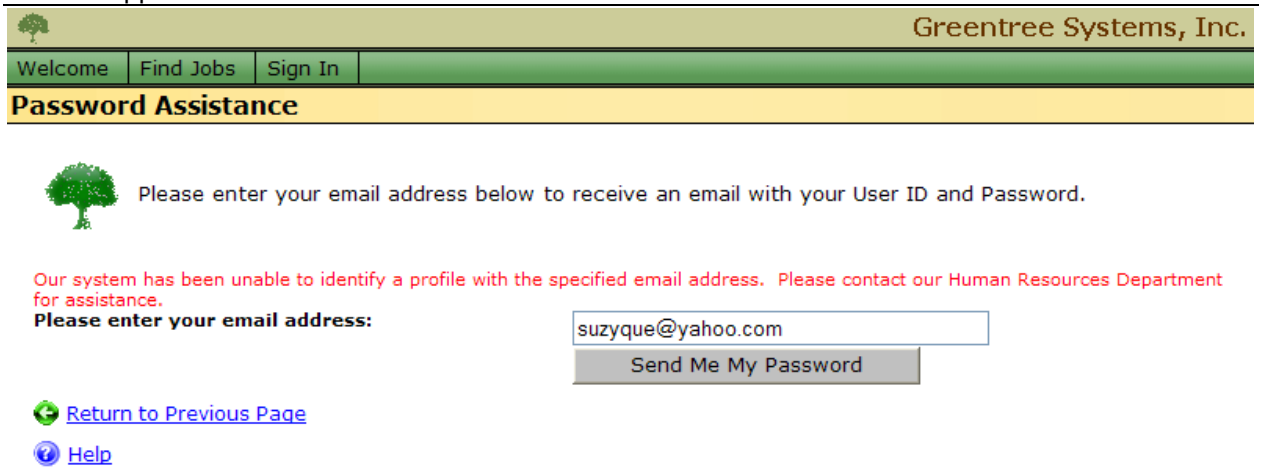
Password Assistance

The password assistance page allows Applicants who have forgotten their UserID and/or Password with securely obtaining that information. The Applicant needs only to enter their email address and click the Send Me My Password button to have an email generated that contains the UserID and Password information associated with that email address.

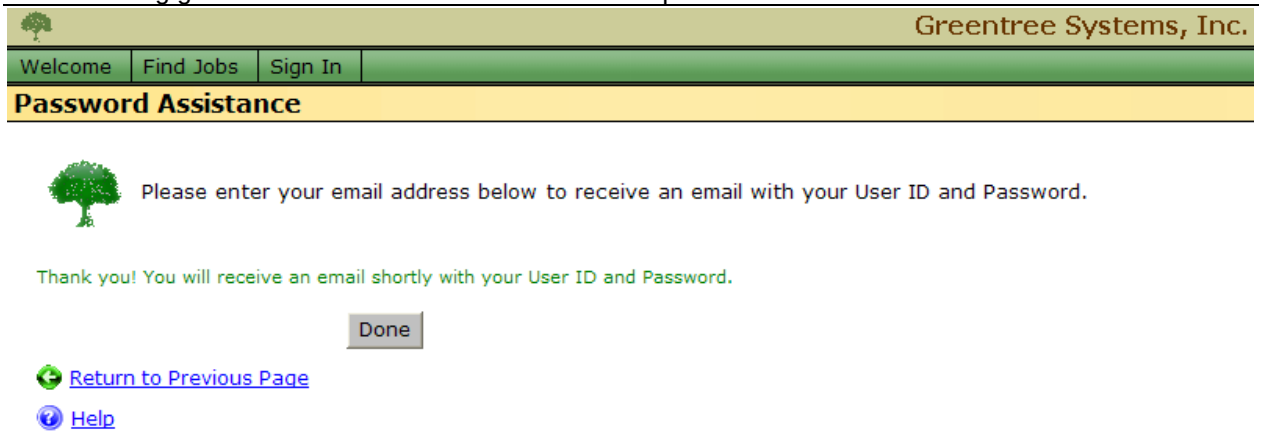


It is important to note that the password assistance only works for those Applicants who have an email address already on file in iGreentree. If the email address entered by the Applicant can not be found in

the database an error message will be displayed. An error message will also be displayed if the email address appears more than once in the database.


Greentree Systems, Inc.
Welcome
Find Jobs
Sign In
Password Assistance
Please enter your email address below to receive an email with your User ID and Password.
Our system has been unable to identify a profile with the specified email address. Please contact our Human Resources Department for assistance.
Please enter your email address:
suzyque@yahoo.com
Send Me My Password
Return to Previous Page
Help

If the email address provided exists in iGreentree the Applicant will receive a message confirming an email is being generated and sent to the email address provided.


Greentree Systems, Inc.
Welcome
Find Jobs
Sign In
Password Assistance
Please enter your email address below to receive an email with your User ID and Password.
Thank you! You will receive an email shortly with your User ID and Password.
Done
Return to Previous Page
Help

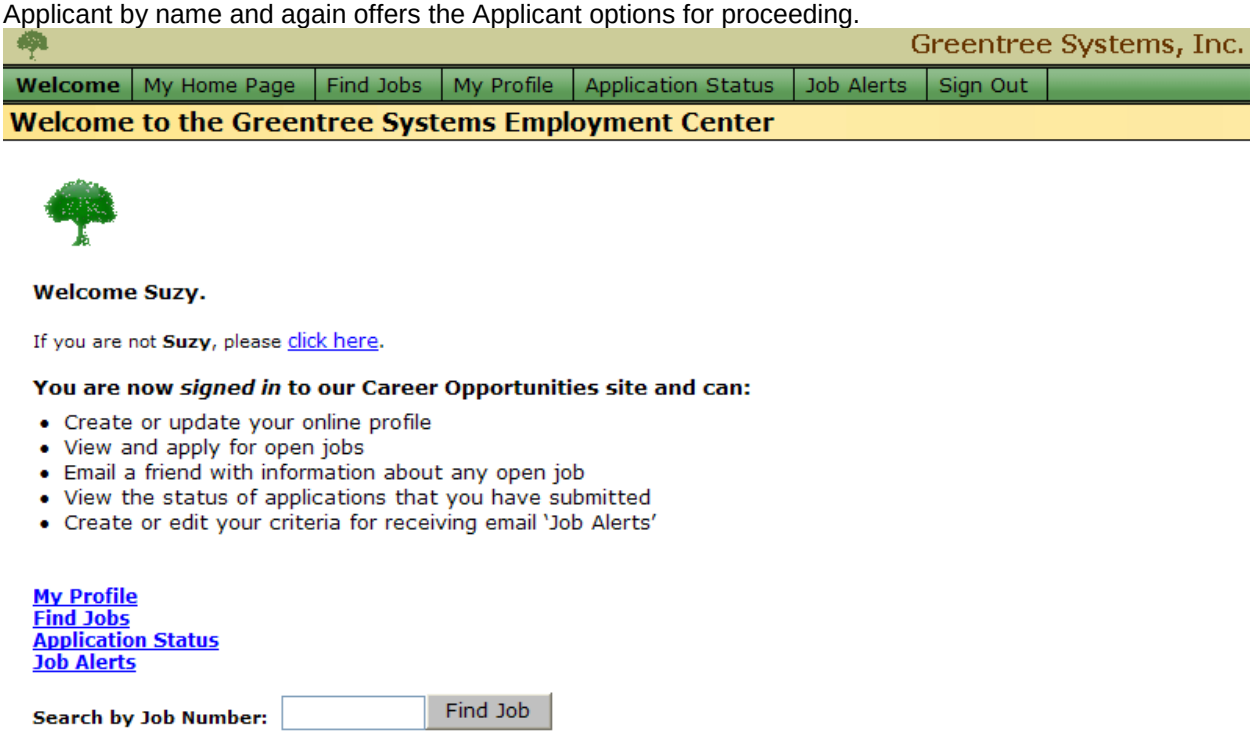
The content of the email that is sent to the Applicant can be edited in *Letters Maintenance* and the letter name must be specified in *CSS Settings Maintenance*.


From: AutoMail@iGreentree.com
Sent: Thu 6/24/2004 2:39 PM
To: AutoMail@iGreentree.com
Cc:
Subject: UserID and Password per your request
June 24, 2004
Dear Suzy Que,
Thanks for registering on our Employment Web Site.
Here are your UserID and Password:
UserID: SuzyQue
Password: SQ10203
To sign into our Employment Web Site at you may use either the above UserID or your Email, along with the above password. Once signed in, you may change your UserID or password, or both.
Thank you for considering employment opportunities with us!
Sincerely,
Human Resources

Upon receipt of the UserID and Password the Applicant can return to Candidate Self-Service and login from the main *Welcome* page.

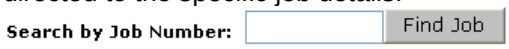


When the Applicant logs in successfully, the revised *Welcome* page will appear that welcomes the Applicant by name and again offers the Applicant options for proceeding.

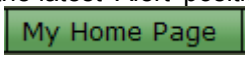

Greentree Systems, Inc.
Welcome
My Home Page
Find Jobs
My Profile
Application Status
Job Alerts
Sign Out
Welcome to the Greentree Systems Employment Center
Welcome Suzy.
If you are not Suzy, please click here.
You are now signed in to our Career Opportunities site and can:
Create or update your online profile
View and apply for open jobs
Email a friend with information about any open job
View the status of applications that you have submitted
Create or edit your criteria for receiving email 'Job Alerts'
My Profile
Find Jobs
Application Status
Job Alerts
Search by Job Number:
Find Job

Search by Job Number

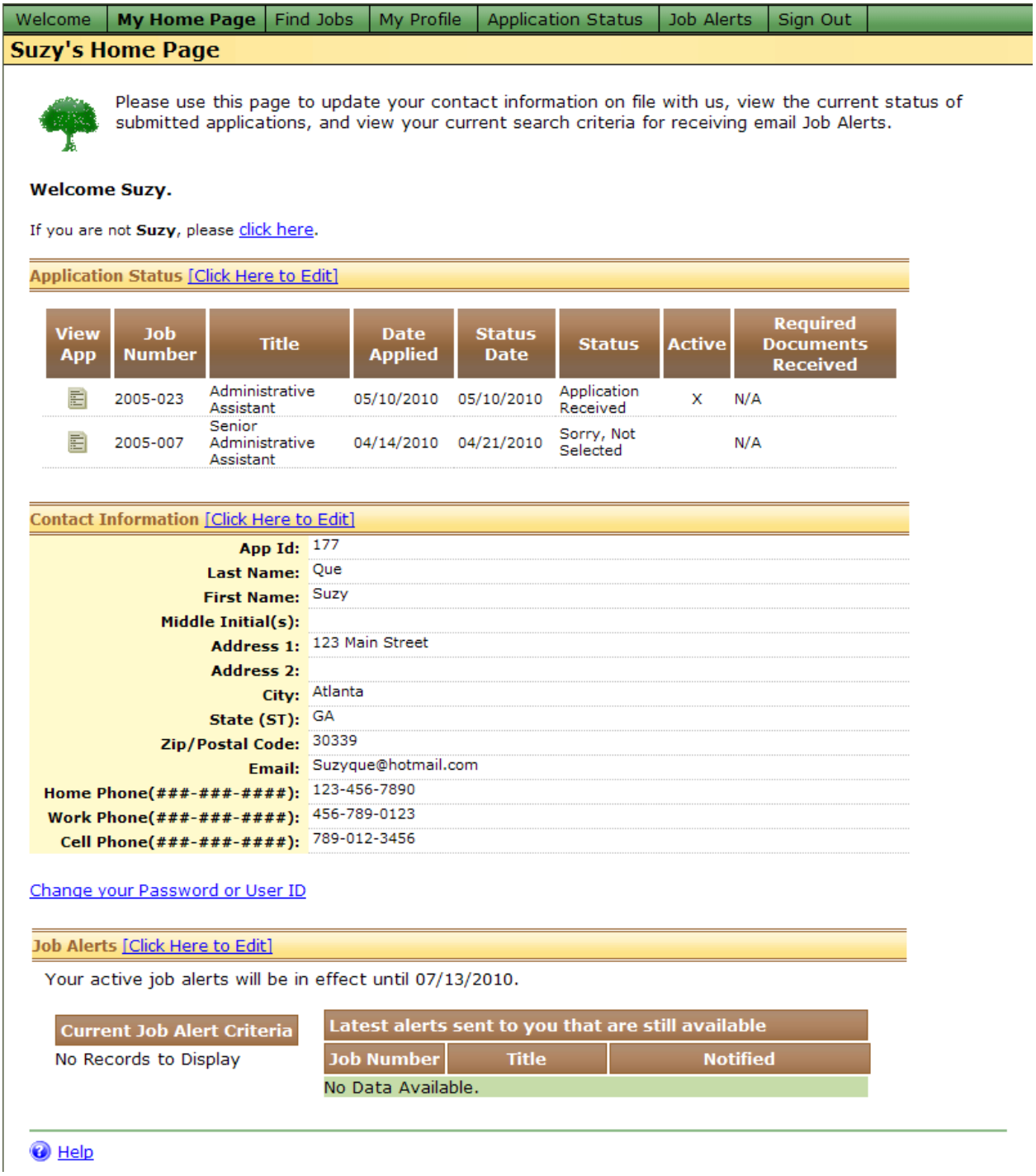
Applicants who have knowledge of a specific job number may elect to immediately search for that job by its job number. They can simply enter the job number into the field and click the *Find Job* button to be directed to the specific job details.



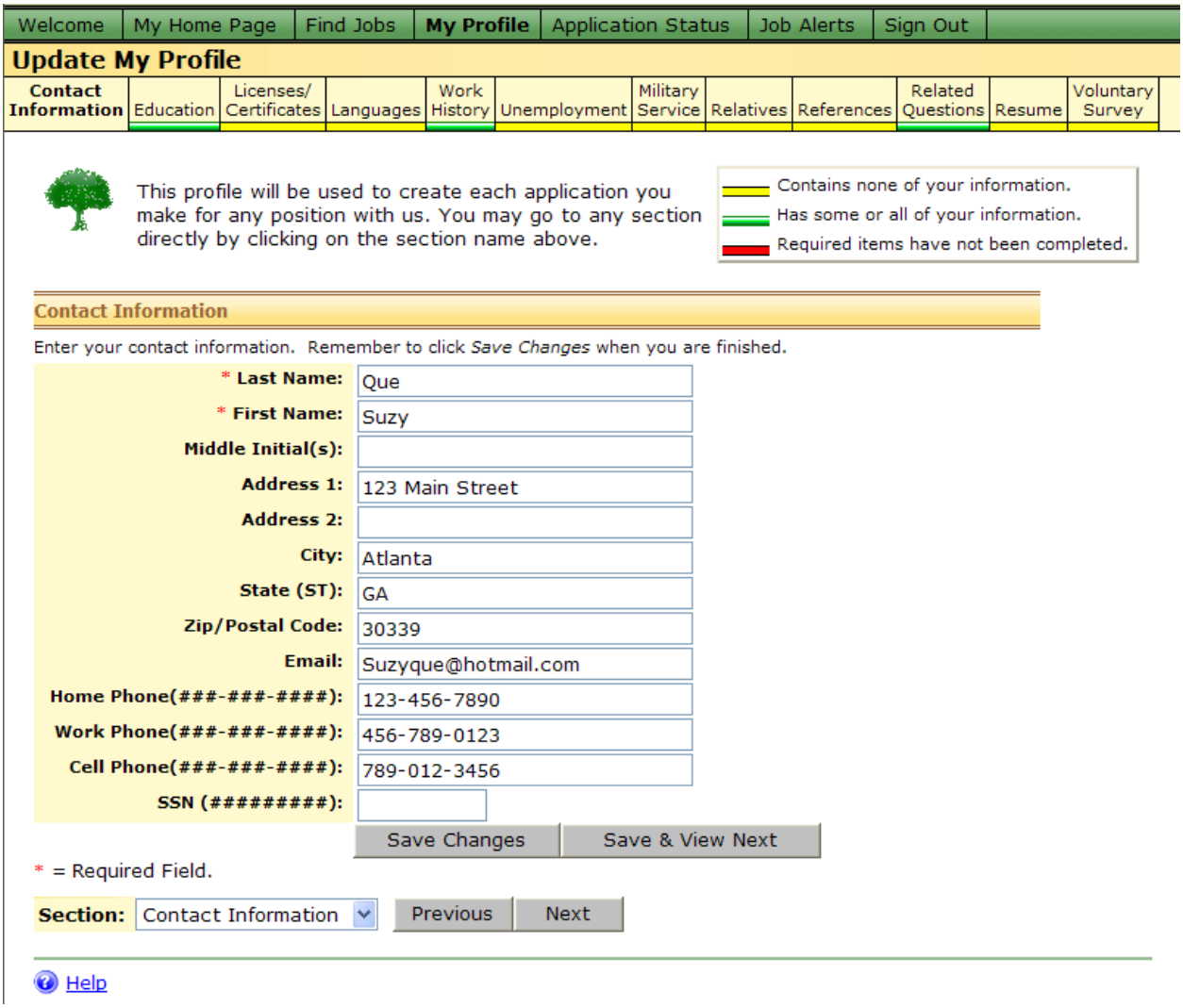
My Home Page

The *My Home Page* contains the stored Contact Information, details about the status of Applications for jobs applied for, and information about any Job Alerts that the Applicant may have enabled. Applicants can also view the latest 'Alert' positions sent to them. The main menu at the top of the *Welcome* page provides a link 

to this section of CSS.

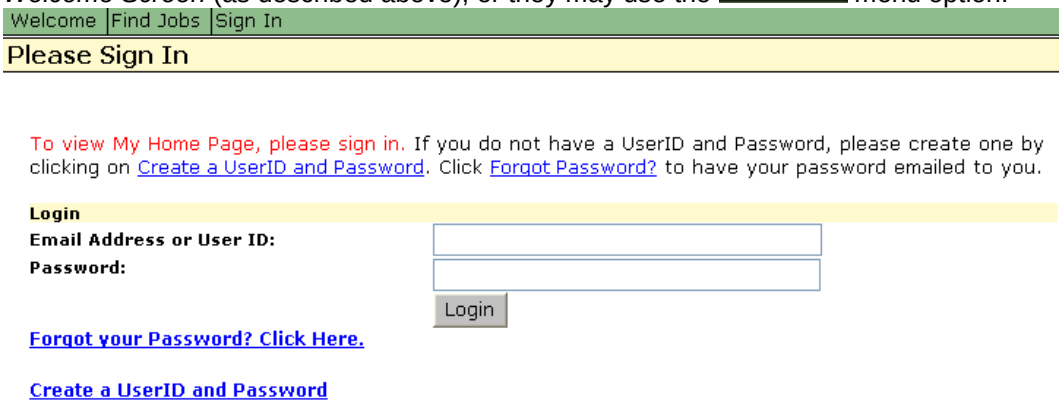


To enter *Contact Information*, the Applicant can click on [Click Here to Edit] link or use the *My Profile* link in the top menu. Both links will move the Applicant into the updatable Contact Information page.



The Applicant's name and email (if provided) will populate from the data collected when they created their UserID and Password. The data entered into Contact Information can be found in the Applicant's database record or in the *Contact Information* Attachment in the iGreentree database.

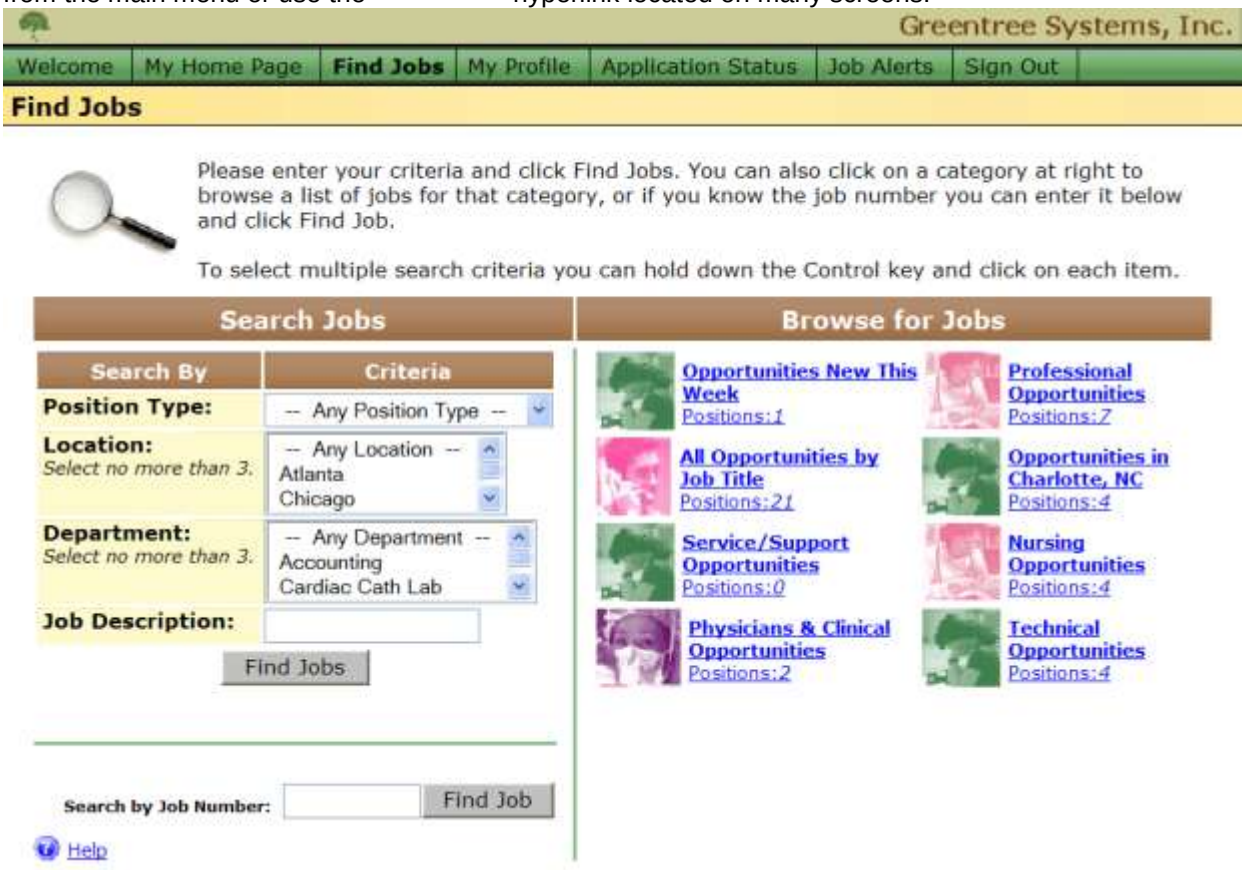
Applicants must log in before accessing the *My Home Page*. An Applicant can either sign in on the *Welcome Screen* (as described above), or they may use the Sign In menu option.


Welcome
Find Jobs
Sign In
Please Sign In
To view My Home Page, please sign in. If you do not have a UserID and Password, please create one by clicking on Create a UserID and Password. Click Forgot Password? to have your password emailed to you.
Login
Email Address or User ID:
Password:
Login
Forgot your Password? Click Here.
Create a UserID and Password

A returning Applicant can log in using either their email address or UserID and their previously established password. If the Applicant enters incorrect information, they will receive an error message on the screen (usually appears in red). The error typically provides another link to a page that will email the password to them.

Find Jobs

Find Jobs lets you find open jobs using your own search criteria, by browsing categories of open jobs, or by entering a specific job number if you know it. To access, the Applicant can either click on **Find Jobs** from the main menu or use the **Find Jobs** hyperlink located on many screens.

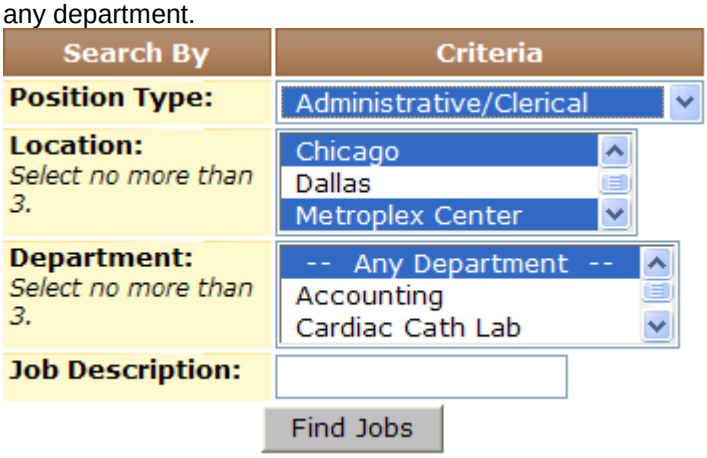


Search Jobs

Search Jobs is located on the left side of the *Find Jobs* screen. This method of searching for positions utilizes a search engine that allows the Applicant to define the criteria that will be used in searching for available positions. *If multiple CSS sites are being used, Internal and External Applicants may be set up to receive different fields for searching and different criteria may be used to define which openings are included with the results.* The fields available for the Applicant's search are defined in *CSS Settings Maintenance* along with the number of codes that can be selected from each field.



The Applicant has the option to select multiple criteria for one or more of the fields. For instance, they can select to specifically look at opportunities with a Location of Chicago or the Metroplex Center and for any department.

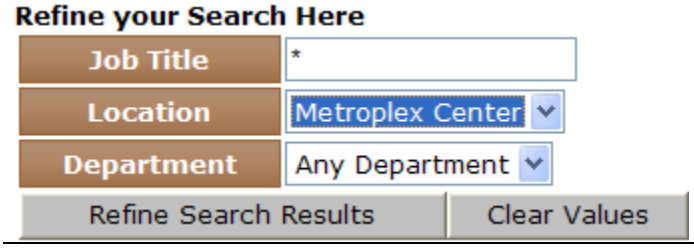


Once the Applicant selects the criteria they may choose the 

button to see the results of their search. The results will be further defined by criteria set up in *CSS Settings Maintenance* that specifies things like posting date requirements and status codes. Which fields of data are displayed is also maintained in *CSS Settings Maintenance*.



The Applicant will have the option to further refine their search if the results are too many. For instance, he/she can further define the location to be just the Metroplex Center by entering Metroplex Center in the Location field and selecting the Refine Search Results button.



The refined results will then be displayed.

Job Title	Location	Department	Job No.
1. Administrative Assistant	Metroplex Center	Accounting	2005-057
2. Senior Administrative Assistant	Metroplex Center	MIS	2005-019

Available Positions: *2*

Browse Jobs

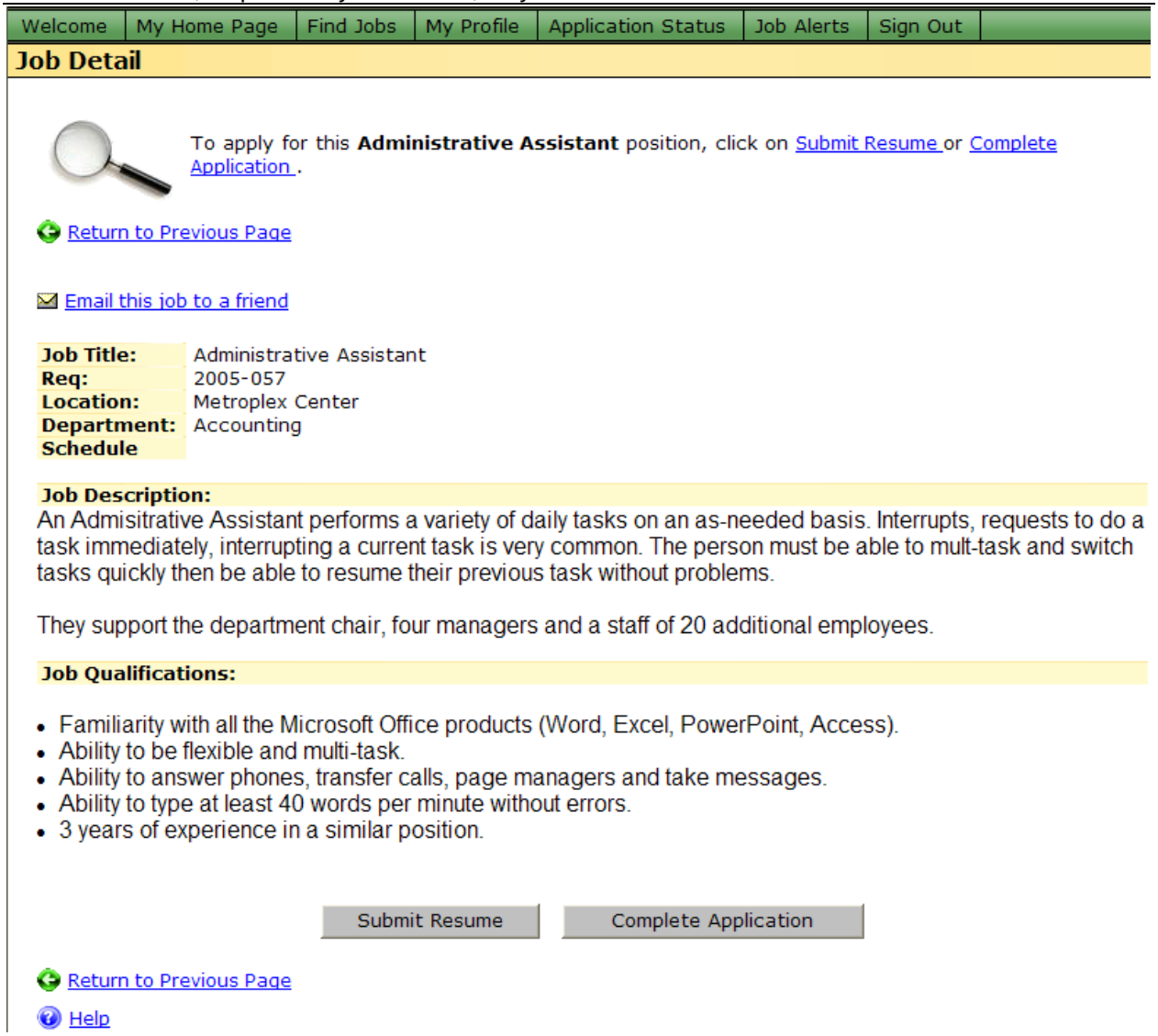
Browse Jobs is located on the right side of the *Find Jobs* screen; all available opportunities will be grouped together into categories that are often sorted by functionality or location. These categories will allow the Applicant to quickly see what types of positions are available. Each of the categories displays a count of the number of available positions within that category. The counts are updated periodically, typically every 15 minutes. The Applicant can then click on a particular job category and be taken to a current listing of the available positions for that category.



Position information that is shared with the Applicant is pulled from the Requisition record in iGreentree. However, these positions will only display if they meet all of the criteria specified for the selected category. *If multiple CSS sites are being used, each site may be set up to use different categories and different criteria for determining which Requisitions to display.* Which columns of data to be displayed is maintained in *CSS Settings Maintenance*.



The Applicant can click on a specific Job Title to be directed to an even more detailed look at that selected job. The fields that are displayed on the Job Detail page are also maintained in *CSS Settings Maintenance* and, as previously mentioned, may differ between CSS sites


Welcome
My Home Page
Find Jobs
My Profile
Application Status
Job Alerts
Sign Out
Job Detail
To apply for this Administrative Assistant position, click on Submit Resume or Complete Application .
Return to Previous Page
Email this job to a friend
Job Title: Administrative Assistant
Req: 2005-057
Location: Metroplex Center
Department: Accounting
Schedule
Job Description:
An Admisitrative Assistant performs a variety of daily tasks on an as-needed basis. Interrupts, requests to do a task immediately, interrupting a current task is very common. The person must be able to mult-task and switch tasks quickly then be able to resume their previous task without problems.
They support the department chair, four managers and a staff of 20 additional employees.
Job Qualifications:
Familiarity with all the Microsoft Office products (Word, Excel, PowerPoint, Access).
Ability to be flexible and multi-task.
Ability to answer phones, transfer calls, page managers and take messages.
Ability to type at least 40 words per minute without errors.
3 years of experience in a similar position.
Submit Resume
Complete Application
Return to Previous Page
Help

The Applicant can elect to apply for a position by clicking the Complete Application button or by using the Complete Application link at the top of the page. If the Applicant determines they are not qualified or not interested then they can use the Return to Previous Page link at the top or bottom of the page to return to the previous page which contains the results for the selected category.

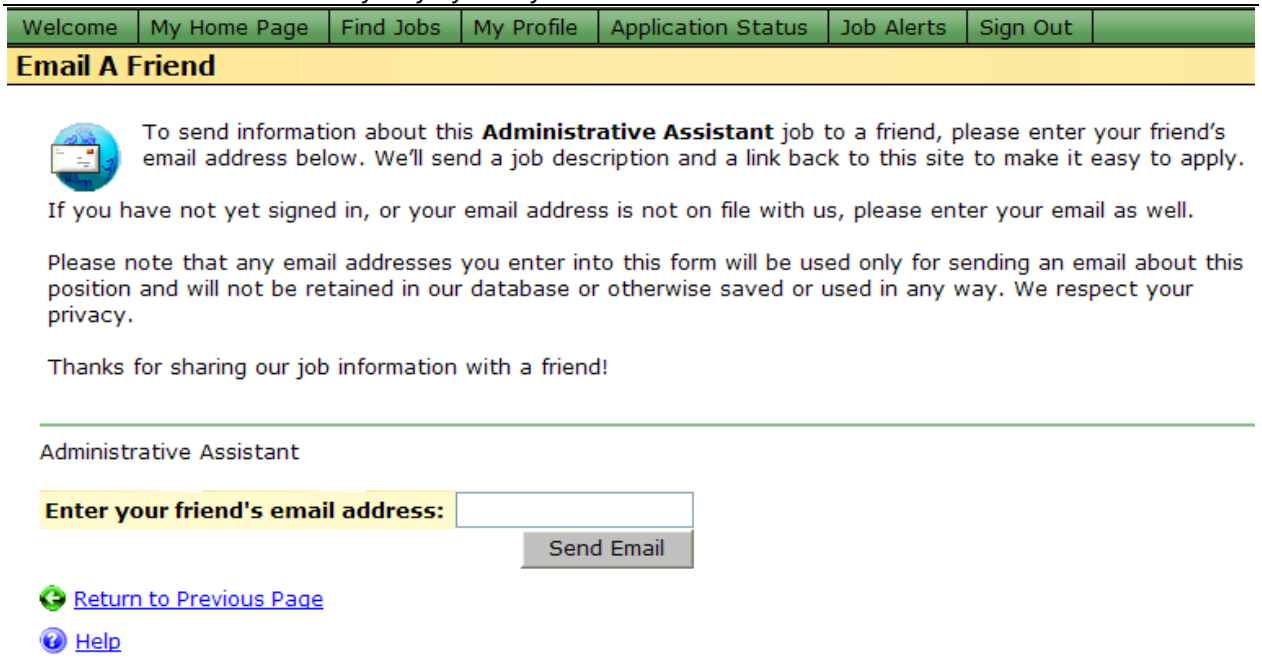
If the Requisition is created with the *Allow Expression of Interest* box selected then the Applicant is presented with the option to submit their resume in response to the job opportunity. This is done by clicking the Submit Resume button or by using the Submit Resume link at the top of the page. A job Application may be required later.

Email A Friend

If the Applicant finds a job opportunity that they feel would be suitable for someone else, they have the ability to forward the information to that friend from the Job Detail page.



Using Email this job to a friend the Applicant will be directed to another page that provides a place for entry of an email address for the friend he/she wishes to notify of the opening. The provided email address is NOT retained in any way by the system.


Welcome
My Home Page
Find Jobs
My Profile
Application Status
Job Alerts
Sign Out
Email A Friend
To send information about this Administrative Assistant job to a friend, please enter your friend's email address below. We'll send a job description and a link back to this site to make it easy to apply.
If you have not yet signed in, or your email address is not on file with us, please enter your email as well.
Please note that any email addresses you enter into this form will be used only for sending an email about this position and will not be retained in our database or otherwise saved or used in any way. We respect your privacy.
Thanks for sharing our job information with a friend!
Administrative Assistant
Enter your friend's email address:
Send Email
Return to Previous Page
Help

Once the email address has been entered, and Send Email selected, a referral email message (Customer defined in *Letters Maintenance*) is sent to the email address provided.

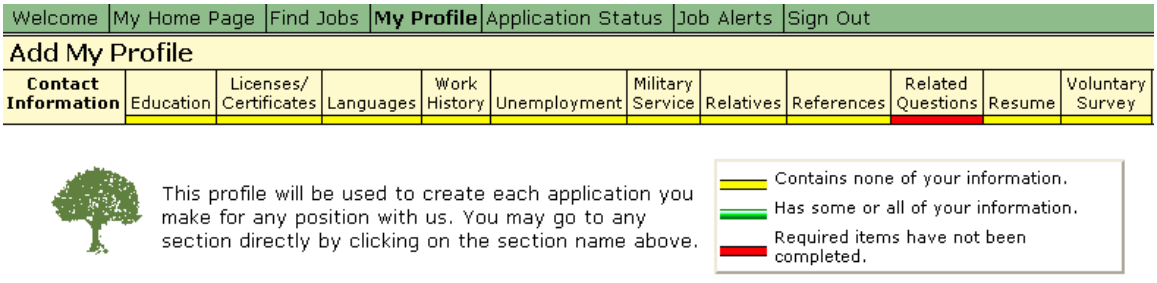

From: Dougr@GreentreeSystems.com Sent: Thu 2/12/2004 8:51 AM
To: StephanieF@GreentreeSystems.com
Cc:
Subject: Employment Opportunity Alert
Attachments: ATT00001.htm (1 KB)
February 12, 2004
A friend of yours thought you might be interested in one of our currently open positions:
Job Title: Information Technology Specialist
Location: HQ
If you would like to view more information, or to apply for this position, please click on the following link:
HTTP://tank.gtsdev.com:10203/CSSExt/CSSPage_Referred.ASP?ReqKey=7C961592-7BA3-4144-9EC4-5409FFC60067&AppKey=AA5040C5-AC26-4B7F-B2A7-6C0806A856A6&
Please note that this email is not spam, and was requested by the sender.
Sincerely,
Human Resources

The Applicant who is sending the referral will receive confirmation that the email was successfully sent. The Applicant then has the option to either add another email address or to choose the Return to Previous Page link and return to the job detail page.

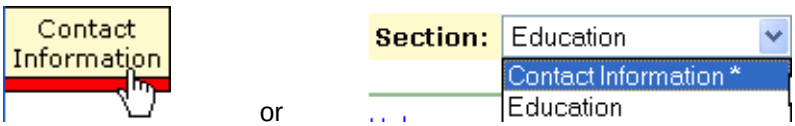


My Profile

Applicants will use this section to enter and update their Application information. They can return to this area at any time and add, edit, or update information. Therefore, each time they apply for a position their most current information will be automatically incorporated into the online Application, ready for them to review and submit.



Each section of the Profile is displayed below the main menu and the different color bars underneath indicate the 'completeness' of that section. Any section that is red (not completed) will prevent the Applicant from submitting their Application as it contains required pieces of information. To complete the sections the Applicant can either click on the section name (located at the top of the page) or use the drop down menu (located at the bottom of each page) to navigate to the desired section.



To view the sections sequentially, without saving information, the Next and Previous buttons at the bottom of the page can be used.

The fields that are marked with a * are a required entry. The Applicant cannot save the changes for a section if the required fields are not populated. Once the Applicant has completed the section they can navigate to the next section using the methods above, or by clicking Save & View Next. This will bring the Applicant to the next section.

Contact Information

The *Contact Information* section is where basic demographic data is collected about the Applicant. The data entered into this section will be used to populate the Applicant's database record and *Contact Info* in the Attachment section.

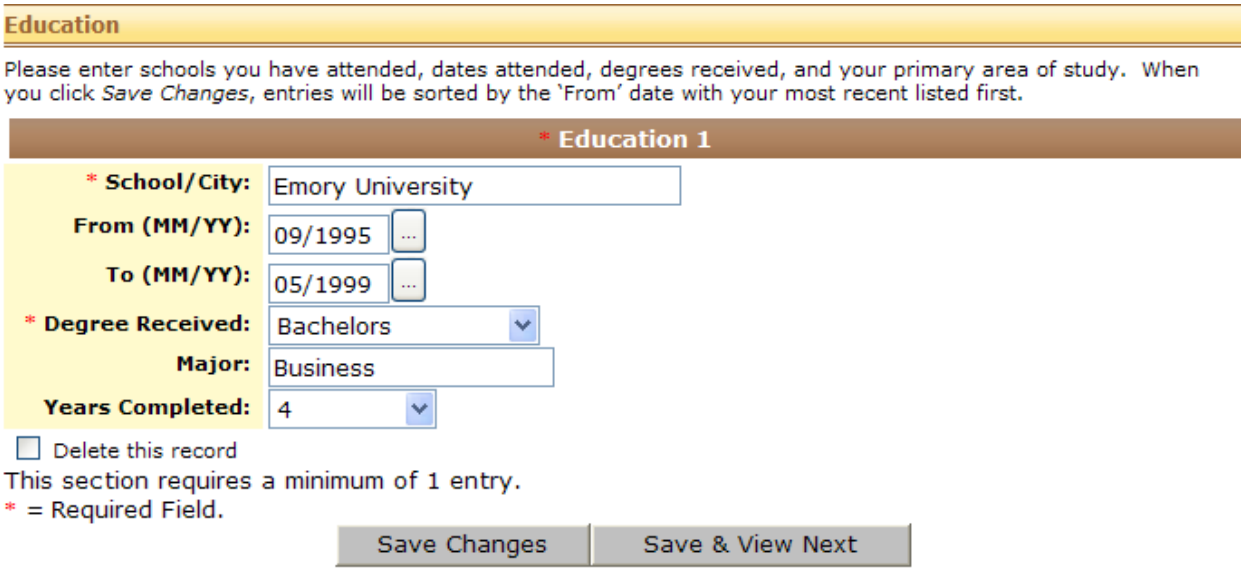
Contact Information

Enter your contact information. Remember to click *Save Changes* when you are finished.

* **Last Name:**	Que
* **First Name:**	Suzy
Middle Initial(s):	
Address 1:	1234 Some Street
Address 2:	
City:	Any City
State (ST):	CA
Zip/Postal Code:	98765
Email:	Suzyque@hotmail.com
Home Phone(###-###-####):	123-456-7890
Work Phone(###-###-####):	987-654-3210
Cell Phone(###-###-####):	
SSN (#########):	123456789

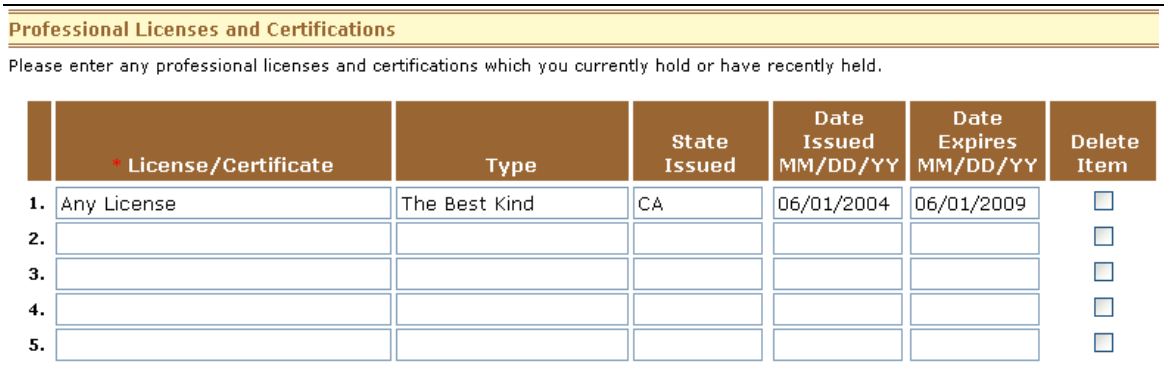
Education

The *Education* section populates the *Education Summary* Attachment in the Applicant's iGreentree record. This section, and others formatted similarly, will apply the required programming if the Applicant starts to complete an entry but fails to fully complete the row or if there is a minimum number of entries required.


Education
Please enter schools you have attended, dates attended, degrees received, and your primary area of study. When you click Save Changes, entries will be sorted by the 'From' date with your most recent listed first.
* Education 1
* School/City: Emory University
From (MM/YY): 09/1995
To (MM/YY): 05/1999
* Degree Received: Bachelors
Major: Business
Years Completed: 4
Delete this record
This section requires a minimum of 1 entry.
* = Required Field.
Save Changes
Save & View Next

Licenses/Certificates

Professional License and Certificates will populate the Applicant's *License & Certificates* Attachment in the iGreentree database.



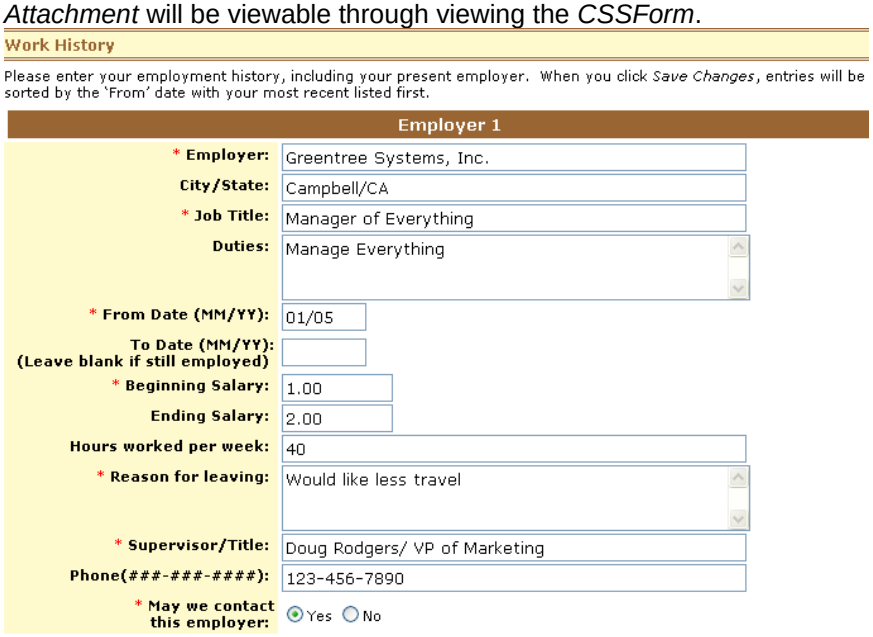
Languages

Foreign Languages does not have an Attachment for data to be stored in within iGreentree. Instead this information will be stored as a part of the *CSSForm* in iGreentree. This data is viewable by going to *CSSForm* Attachment or the *Document List* Attachment in iGreentree.



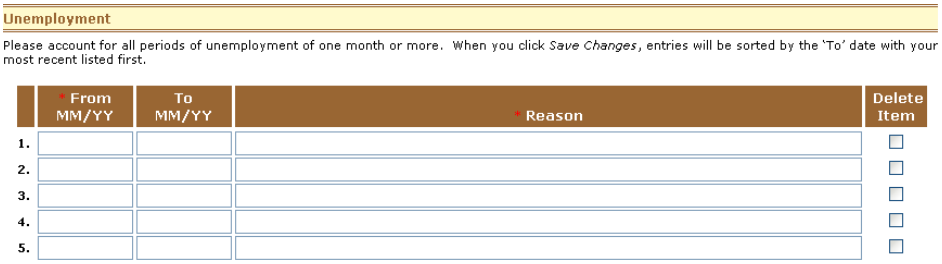
Work History

The majority of the data entered into *Work History* will populate the *Experience Summary Attachment* in the Applicant's iGreentree record. Any information that does not populate in the *Experience Summary Attachment* will be viewable through viewing the *CSSForm*.


Work History
Please enter your employment history, including your present employer. When you click Save Changes, entries will be sorted by the 'From' date with your most recent listed first.
Employer 1
* Employer: Greentree Systems, Inc.
City/State: Campbell/CA
* Job Title: Manager of Everything
Duties: Manage Everything
* From Date (MM/YY): 01/05
To Date (MM/YY): (Leave blank if still employed)
* Beginning Salary: 1.00
Ending Salary: 2.00
Hours worked per week: 40
* Reason for leaving: Would like less travel
* Supervisor/Title: Doug Rodgers/ VP of Marketing
Phone(###-###-####): 123-456-7890
* May we contact this employer: Yes No

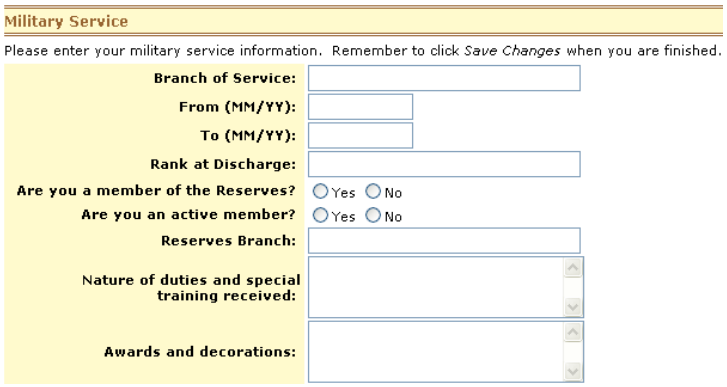
Unemployment

The *Unemployment* section allows Applicants to disclose periods of unemployment, this section does not have an Attachment within iGreentree, and therefore, information will be stored as a part of the *CSSForm* in iGreentree.


Unemployment
Please account for all periods of unemployment of one month or more. When you click Save Changes, entries will be sorted by the 'To' date with your most recent listed first.
* From MM/YY
To MM/YY
* Reason
Delete Item
1.
2.
3.
4.
5.

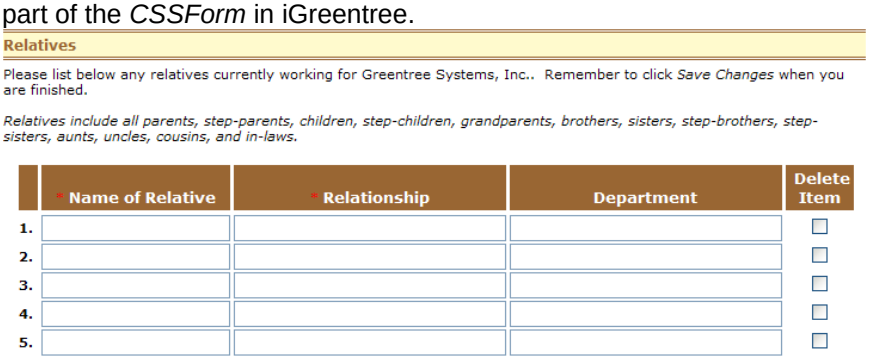
Military Service

Military Service does not have an Attachment within iGreentree, this information will be stored as a part of the *CSSForm* in iGreentree.


Military Service
Please enter your military service information. Remember to click Save Changes when you are finished.
Branch of Service:
From (MM/YY):
To (MM/YY):
Rank at Discharge:
Are you a member of the Reserves? Yes No
Are you an active member? Yes No
Reserves Branch:
Nature of duties and special training received:
Awards and decorations:

Relatives

The *Relatives* section allows Applicants to disclose any family members working within your organization. This section does not have an Attachment within iGreentree, and therefore, information will be stored as part of the *CSSForm* in iGreentree.



Relatives

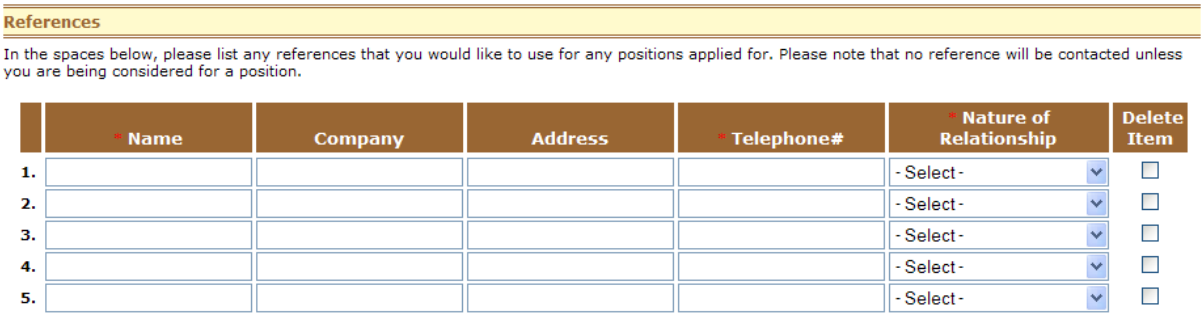
Please list below any relatives currently working for Greentree Systems, Inc.. Remember to click *Save Changes* when you are finished.

Relatives include all parents, step-parents, children, step-children, grandparents, brothers, sisters, step-brothers, step-sisters, aunts, uncles, cousins, and in-laws.

	* Name of Relative	* Relationship	Department	Delete Item
1.				☐
2.				☐
3.				☐
4.				☐
5.				☐

References

This section allows you to collect Reference information for the Applicant. This data is viewable by going to the *CSSForm* Attachment or the *Document List* Attachment in iGreentree.



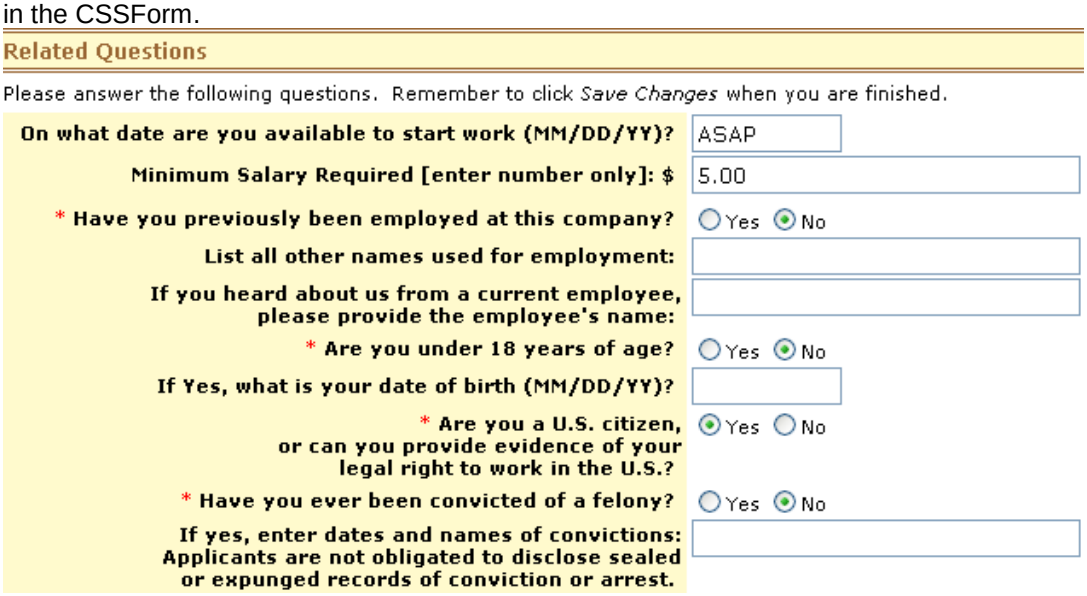
References

In the spaces below, please list any references that you would like to use for any positions applied for. Please note that no reference will be contacted unless you are being considered for a position.

	* Name	Company	Address	* Telephone#	* Nature of Relationship	Delete Item
1.					- Select -	☐
2.					- Select -	☐
3.					- Select -	☐
4.					- Select -	☐
5.					- Select -	☐

Related Questions

The *Related Questions* section of an Application allows you to collect miscellaneous information about an Applicant that does not fall into one of the categories above. Some examples may include: Work Status, Salary Requirements and/or conviction information. Some of the data may populate information in the iGreentree Applicant Form (depending on amount of customization), however much of the data is stored in the CSSForm.



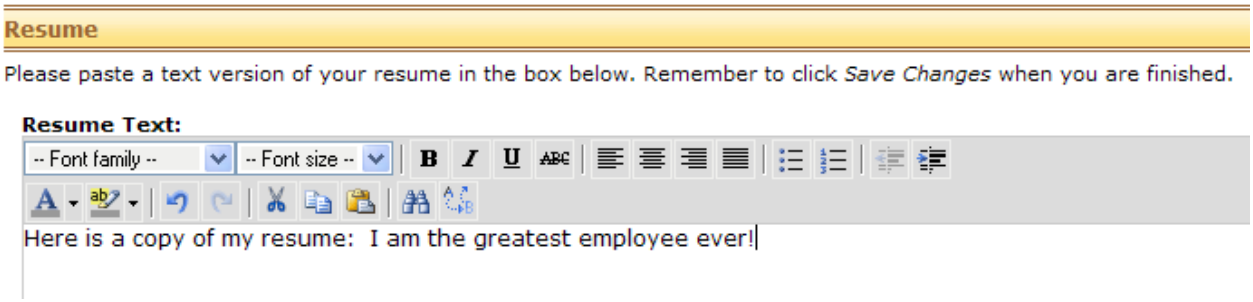
Related Questions

Please answer the following questions. Remember to click *Save Changes* when you are finished.

On what date are you available to start work (MM/DD/YY)?	ASAP
Minimum Salary Required [enter number only]: $	5.00
* **Have you previously been employed at this company?**	○ Yes ◉ No
List all other names used for employment:	
If you heard about us from a current employee, please provide the employee's name:	
* **Are you under 18 years of age?**	○ Yes ◉ No
If Yes, what is your date of birth (MM/DD/YY)?	
* **Are you a U.S. citizen, or can you provide evidence of your legal right to work in the U.S.?**	◉ Yes ○ No
* **Have you ever been convicted of a felony?**	○ Yes ◉ No
If yes, enter dates and names of convictions: Applicants are not obligated to disclose sealed or expunged records of conviction or arrest.	

Resume

The *Resume* section allows the Applicant an opportunity to paste a text version of his/her resume to be submitted along with his/her Application. It can be viewed from the *Resume Text Attachment* and from the *Document List Attachment* in iGreentree.


Resume
Please paste a text version of your resume in the box below. Remember to click Save Changes when you are finished.
Resume Text:
-- Font family --
-- Font size --
Here is a copy of my resume: I am the greatest employee ever!

Voluntary Survey

The *Voluntary Survey* collects information that allows the Applicant to self-identify for EEO recording and Affirmative Action reporting. The information that is collected here will be stored in the Applicant's *EEO Attachment* in iGreentree. It is important to know that t*his section of the Application is NOT included in the stored* CSSForm *so that the information is not viewable by Hiring Managers!*

Voluntary Survey

We are an Equal Opportunity employer and do not discriminate on the basis of race, ancestry, color, religion, sex, age marital status, sexual orientation, national origin, medical condition, disability, veteran status, or any other basisprotected by law.

Theinformation provided will be used for research, reporting, statistical purposes and to monitor legal compliance. To help us comply with these government requirements, please complete the following document.

Completion of this form is voluntary and will not affect your opportunity for employment or terms or conditions of employment if hired. We appreciate your cooperation.

The following definitions are as offered by the federal government:

Gender:

- ○ **Male**
- ○ **Female**
- ○ **I Choose Not to Respond**

Ethnicity:
Are you Hispanic or Latino?

- ○ **No, not Hispanic or Latino.**
- ○ **Yes, Hispanic or Latino.**
  A person of Cuban, Mexican, Puerto Rican, South or Central America, or other Spanish culture or origin, regardless of race.
- ○ **I Choose Not to Respond**

Race:
If not Hispanic or Latino, please select one of the following race categories.

- ○ **White (Not Hispanic or Latino)**
  A person having origins in any of the original peoples of Europe, the MiddleEast, or North Africa.
- ○ **Black or African American (Not Hispanic or Latino)**
  A persons having origins in any of the Black racial groups of Africa.
- ○ **Asian (Not Hispanic or Latino)**
  A person having origins in any of the original peoples of the Far East, Southeast Asia or the Indian Subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, The Philippine Islands, Thailand, and Vietnam.
- ○ **Native Hawaiian or other Pacific Islander (Not Hispanic or Latino)**
  A person having origins in any of the peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- ○ **American Indian or Alaskan Native (Not Hispanic or Latino)**
  A person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.
- ○ **Two or More Races (Not Hispanic or Latino)**
- ○ **I Choose Not to Respond**

Disability Status:
(Please choose one of the options below if it describes your disability status)

- ○ **Disabled**
  An individual with a disability is a person who has a physical or mental impairment that substantially limits one or more major life activities, has a record of such impairment, or is regarded as having such an impairment. major life activities are activities that the average person can perform with little or no difficulty such as walking, breathing, seeing, hearing, speaking, learning, and working.
- ○ **Disabled Requiring Reasonable Accommodation**
  Reasonable accommodation may include, but is not limited to, making existing facilities used by employees readily accessible to and usable by persons with disabilities; job restructuring; modifications of work schedules; providing additional unpaid leave; reassignment to a vacant position; acquiring or modifying equipment or devices; adjusting or modifying examinations, training materials, or policies; and providing qualified readers or interpreters. Reasonable accommodation may be necessary to apply for a job, to perform job functions, or to enjoy the benefits and privileges of employment that are enjoyed by people without disabilities. An employer is not required to lower production standards to make an accommodation. An employer generally is not obligated to provide personal use items such as eyeglasses or hearing aids.
- ○ **I am not disabled**
- ○ **I Choose Not to Respond**

Veteran:
(Please choose one of the options below if it describes your veteran status)

- ◉ **I am a veteran**
  Please check all that apply:

  ☐ **Disabled Veteran** – who: (i) is entitled to compensation (or who, but for the receipt of military retired pay, would be entitled to compensation) under laws administered by the Secretary of Veterans Affairs, or (ii) was discharged or released from active duty because of a service-connected disability.

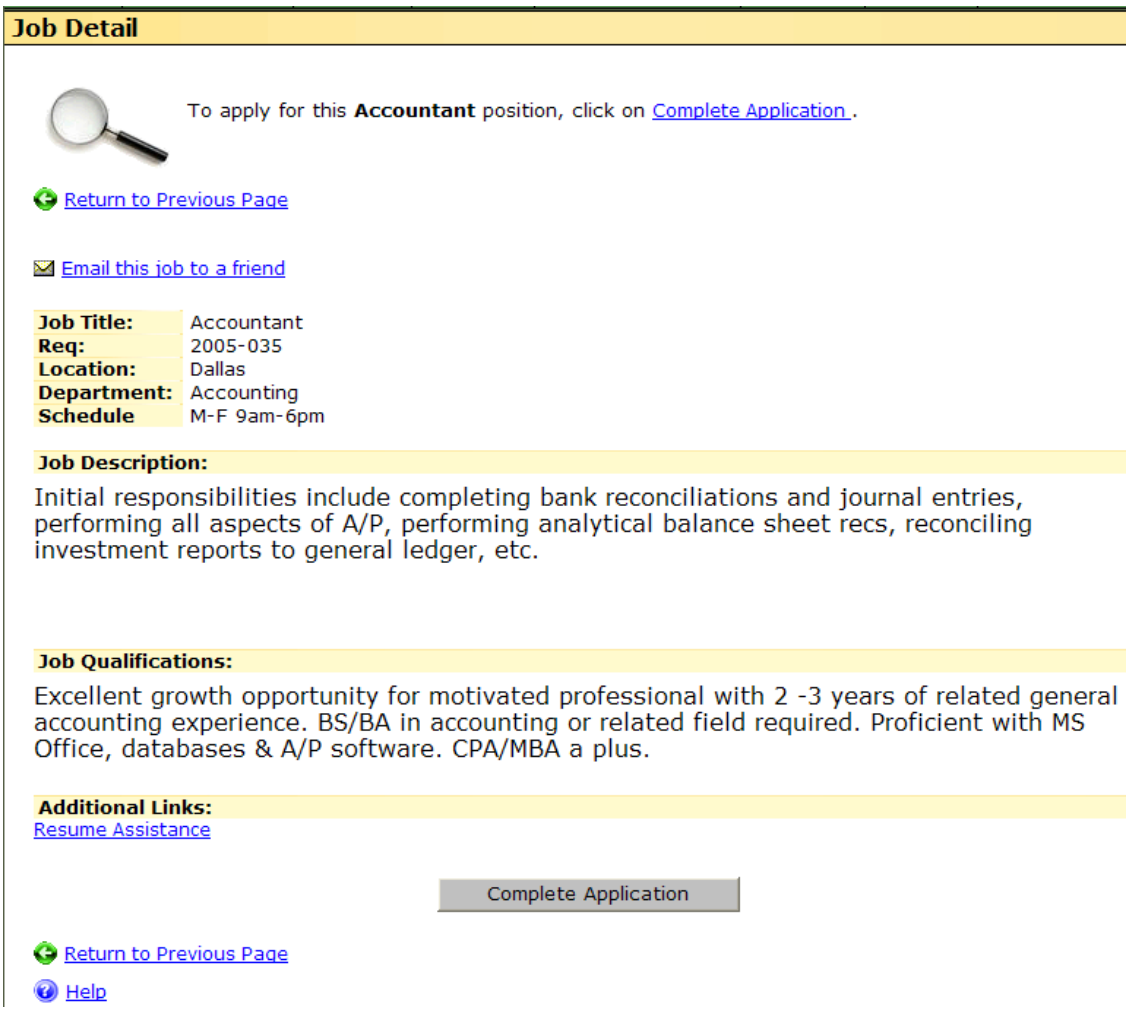
  ☐ **Other Protected Veteran** – who served on active duty in the U.S. military, ground, naval or air service in a war, campaign or expedition in which a campaign badge has been authorized under the laws administered by the Department of Defense.

  ☐ **Armed Forces Service Medal Veteran** – who, while serving on active duty in the U.S. military, ground, naval or air service, participated in a United States military operation for which an Armed Forces service medal was awarded pursuant to Executive Order 12985.

  ☐ **Recently Separated Veteran** – who served on active duty in the U.S. military, ground, naval, or air service, during the three-year period beginning on the date of such veteran's discharge or release from active duty.
- ○ **I am not a veteran**
- ○ **I Choose Not to Respond**

Applying For a Position

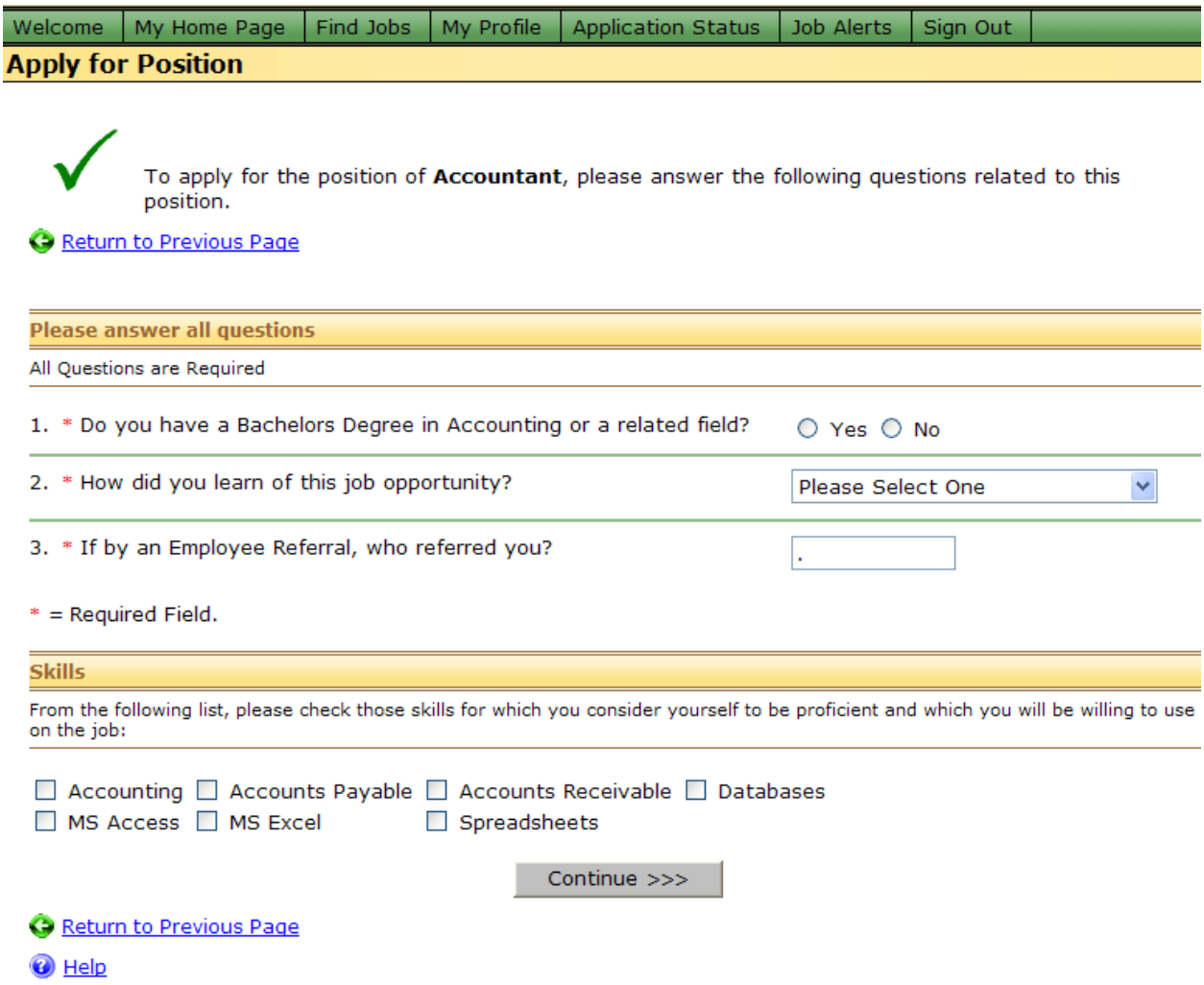
When an Applicant finds a position of interest they can apply on-line for that opportunity. From the Job Detail page, the Applicant can select either the Complete Application button or the Complete Application link.


Job Detail
To apply for this Accountant position, click on Complete Application .
Return to Previous Page
Email this job to a friend
Job Title: Accountant
Req: 2005-035
Location: Dallas
Department: Accounting
Schedule M-F 9am-6pm
Job Description:
Initial responsibilities include completing bank reconciliations and journal entries, performing all aspects of A/P, performing analytical balance sheet recs, reconciling investment reports to general ledger, etc.
Job Qualifications:
Excellent growth opportunity for motivated professional with 2 -3 years of related general accounting experience. BS/BA in accounting or related field required. Proficient with MS Office, databases & A/P software. CPA/MBA a plus.
Additional Links:
Resume Assistance
Complete Application
Return to Previous Page
Help

If the Applicant is not logged into CSS at this time, they will be prompted to do so before they can proceed. The Applicant can sign in using their UserID or email address, and Password. If the Applicant is new, the link Create a UserID/Password is provided. As previously mentioned, links are also provided to assist the Applicant if they have forgotten their password.

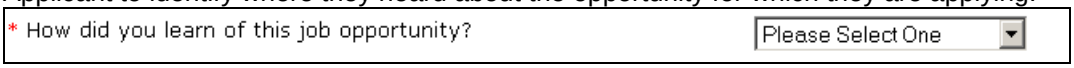


Once the Applicant has signed in, or if they signed in prior to selecting Complete Application, they will then be brought to a prescreening page that may contain several types of questions. Some of the questions are referred to as *Global Questions* and others are *Requisition Specific Questions*. This page also collects Skills information for this specific Requisition.


Welcome
My Home Page
Find Jobs
My Profile
Application Status
Job Alerts
Sign Out
Apply for Position
To apply for the position of Accountant, please answer the following questions related to this position.
Return to Previous Page
Please answer all questions
All Questions are Required
1. * Do you have a Bachelors Degree in Accounting or a related field? Yes No
2. * How did you learn of this job opportunity? Please Select One
3. * If by an Employee Referral, who referred you?
* = Required Field.
Skills
From the following list, please check those skills for which you consider yourself to be proficient and which you will be willing to use on the job:
Accounting
Accounts Payable
Accounts Receivable
Databases
MS Access
MS Excel
Spreadsheets
Continue >>>
Return to Previous Page
Help

Global Questions

Global Questions are questions that are asked of every Applicant who applies, EVERY time they apply. The Applicant is required to answer the question and will not be able to continue if they choose not to answer them. The questions may be essay, multi-select (allows for selection of multiple answers), multiple choice, single entry, source, or yes/no. The most common *Global Question* is one requesting the Applicant to identify where they heard about the opportunity for which they are applying.



The answers given by Applicants to the *Global Questions* are kept within the Applicant's CSSForm. This form is viewable in the Applicant's *Document List* Attachment in iGreentree. With the exception of the question relating to *Source*, the answers are stored in the *CSS Question Answers History* (source responses will populate the Applicant's *Sources History*). The *Global Questions* can be set up under iGreentree in *CSS Settings Maintenance*.

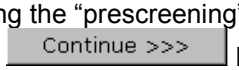
Requisition Specific Questions

Requisition Specific Questions are questions that are identified for a particular Requisition. These questions can be set up in *CSS Questions Attachment* for each individual Requisition. If a Requisition has specific questions populated in its *CSS Questions Attachment*, any Applicant who applies for that position will be asked those same questions. The Applicant is required to answer the question and will not be allowed to continue if they choose not to answer them.

The questions can be in the following formats: Yes/No, Essay, Single Entry or Multiple Choice.
The Yes/No and Multiple Choice answers can be assigned a weight for use in prescreening. Each answer can be weighted with one of the following weight equivalents: Must Not Have, Ignore, Nice to Have, Desired, or Highly Desired. If an Applicant chooses an answer that was weighted with "Must Not Have" they can be automatically categorized as not meeting minimum qualifications upon successful submittal of their Application. (For more information concerning CSS Questions and weight assignments please see the *iGT Module Maintenance* Chapter.)

Skills

Skills are Requisition specific much like *Requisitions Specific Questions*. Which position the Applicant is applying for will determine which set of skills is presented for their selection. The skills are defined in a Requisition's *CSS Skills Attachment.* If no skills are identified then the Applicant will not be presented with a *Skill* section when they apply.

After completing the "prescreening" questions, the Applicant can continue into the actual Application by clicking on the 

button.

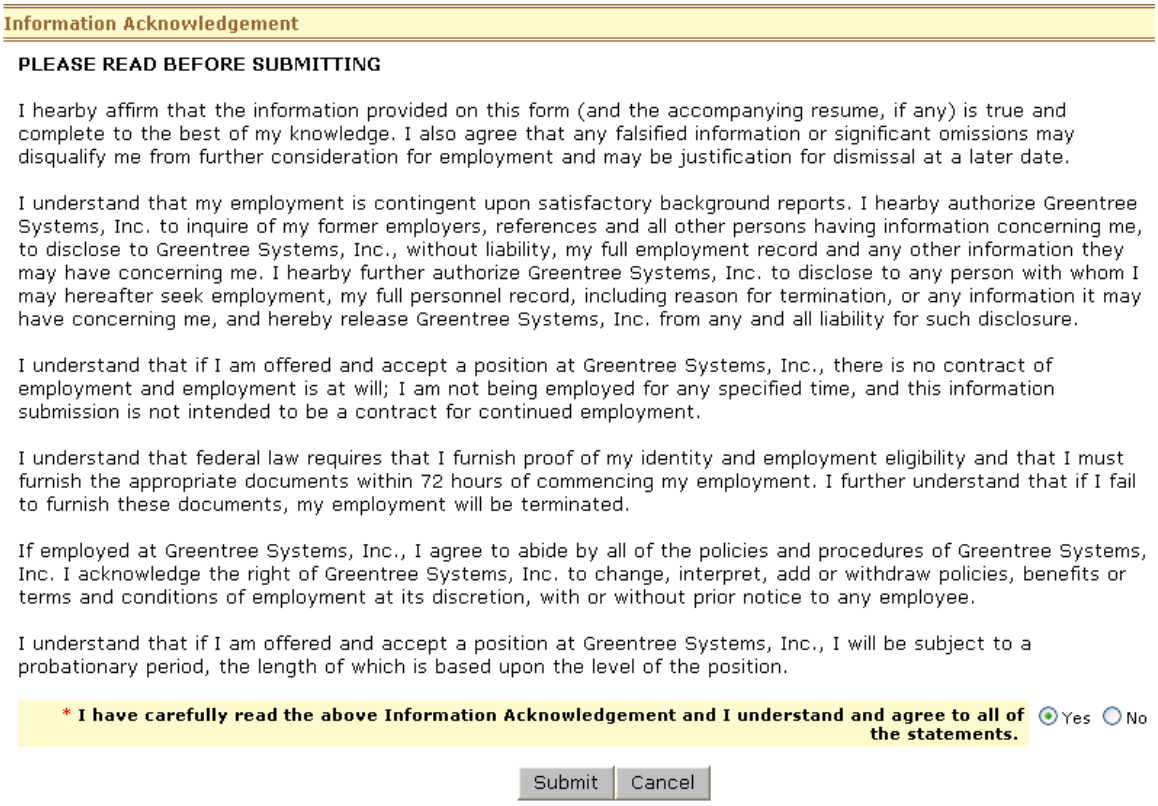
Application

Candidate Self-Service will pull any previously entered data into the current Application so that the Applicant can simply update the data to make it current.

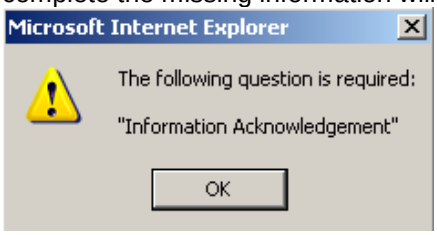


The Applicant may update any section as needed by clicking on the [Click Here to Edit] link in the header of each section to be moved into an edit page for that particular section. When the Applicant chooses Save Changes the entered data will be stored and they will be brought back to the Employment Application summary page, where if necessary, another section can be selected for editing.

Once the Applicant has downloaded the full Application they will see a new section at the very end of the Application labeled *Information Acknowledgement*. This section typically contains a company's legal jargon about employment contingencies, terms and/or practices. It also contains a final question that serves as the "Electronic Signature". Applicants must select "Yes" in answer to the final question or they will not be able to Submit their Application. The *Information Acknowledgement* statement, and the Applicant's "Yes" choice, will be stored within the *CSSForm*.


Information Acknowledgement
PLEASE READ BEFORE SUBMITTING
I hearby affirm that the information provided on this form (and the accompanying resume, if any) is true and complete to the best of my knowledge. I also agree that any falsified information or significant omissions may disqualify me from further consideration for employment and may be justification for dismissal at a later date.
I understand that my employment is contingent upon satisfactory background reports. I hearby authorize Greentree Systems, Inc. to inquire of my former employers, references and all other persons having information concerning me, to disclose to Greentree Systems, Inc., without liability, my full employment record and any other information they may have concerning me. I hearby further authorize Greentree Systems, Inc. to disclose to any person with whom I may hereafter seek employment, my full personnel record, including reason for termination, or any information it may have concerning me, and hereby release Greentree Systems, Inc. from any and all liability for such disclosure.
I understand that if I am offered and accept a position at Greentree Systems, Inc., there is no contract of employment and employment is at will; I am not being employed for any specified time, and this information submission is not intended to be a contract for continued employment.
I understand that federal law requires that I furnish proof of my identity and employment eligibility and that I must furnish the appropriate documents within 72 hours of commencing my employment. I further understand that if I fail to furnish these documents, my employment will be terminated.
If employed at Greentree Systems, Inc., I agree to abide by all of the policies and procedures of Greentree Systems, Inc. I acknowledge the right of Greentree Systems, Inc. to change, interpret, add or withdraw policies, benefits or terms and conditions of employment at its discretion, with or without prior notice to any employee.
I understand that if I am offered and accept a position at Greentree Systems, Inc., I will be subject to a probationary period, the length of which is based upon the level of the position.
* I have carefully read the above Information Acknowledgement and I understand and agree to all of the statements.
Yes
No
Submit
Cancel

If an Applicant forgets to complete fields that are designated required *, an error prompting them to complete the missing information will appear when they attempt to submit.

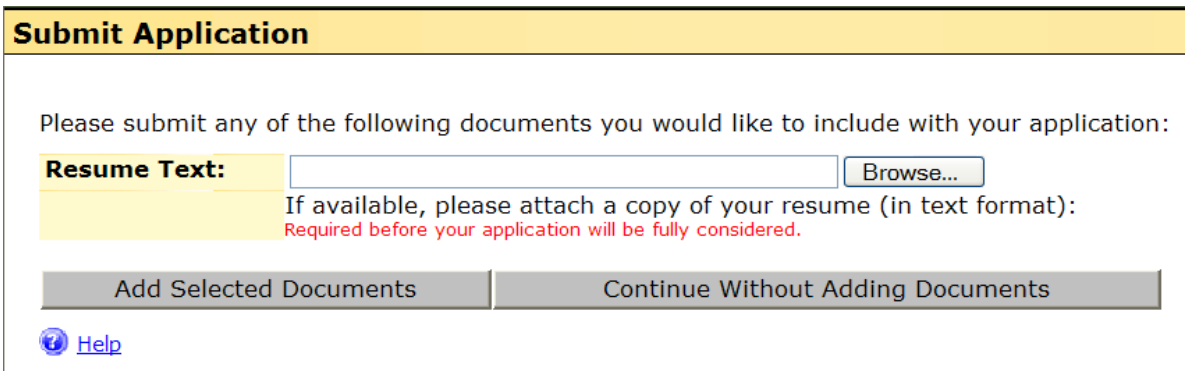


If all required fields are completed and the Applicant clicks Submit, their Applicant record is updated in iGreentree and they will be logged to the appropriate Requisition.

Upload Documents

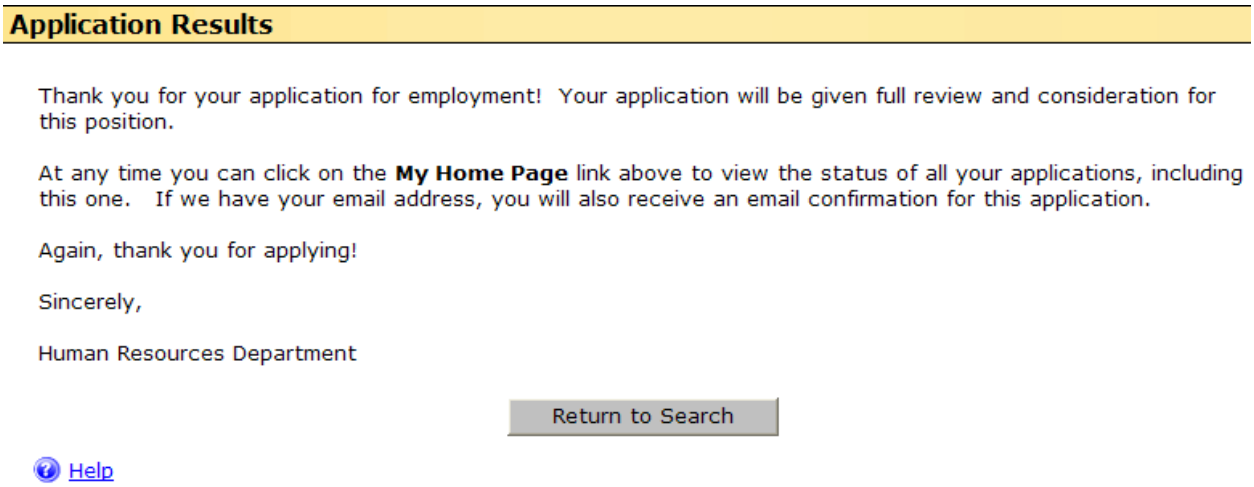
After selecting Submit, the Applicant may be requested to attach specific documents. This request for information is Requisition specific and is set up in the Requisition's *CSS Uploadable Document Attachment* in iGreentree. If no documents are entered into the Requisition's *CSS Uploadable Documents* this request will not be presented to the Applicant.

When specific documents are requested, the Applicant can choose to attach the document. The Browse... button will work very similarly to the attachment button in the User's email. They will be taken to their PC's file directory and be allowed to locate the document and select it. Once selected, the name of their file will populate onto the field on the CSS screen. The Applicant must click the Add Documents button to have the document loaded into iGreentree and attached to their Applicant record's *Document List.* The Applicant may also choose NOT to load the requested document and simply click Continue Without Adding Documents to continue.


Submit Application
Please submit any of the following documents you would like to include with your application:
Resume Text:
Browse...
If available, please attach a copy of your resume (in text format):
Required before your application will be fully considered.
Add Selected Documents
Continue Without Adding Documents
Help

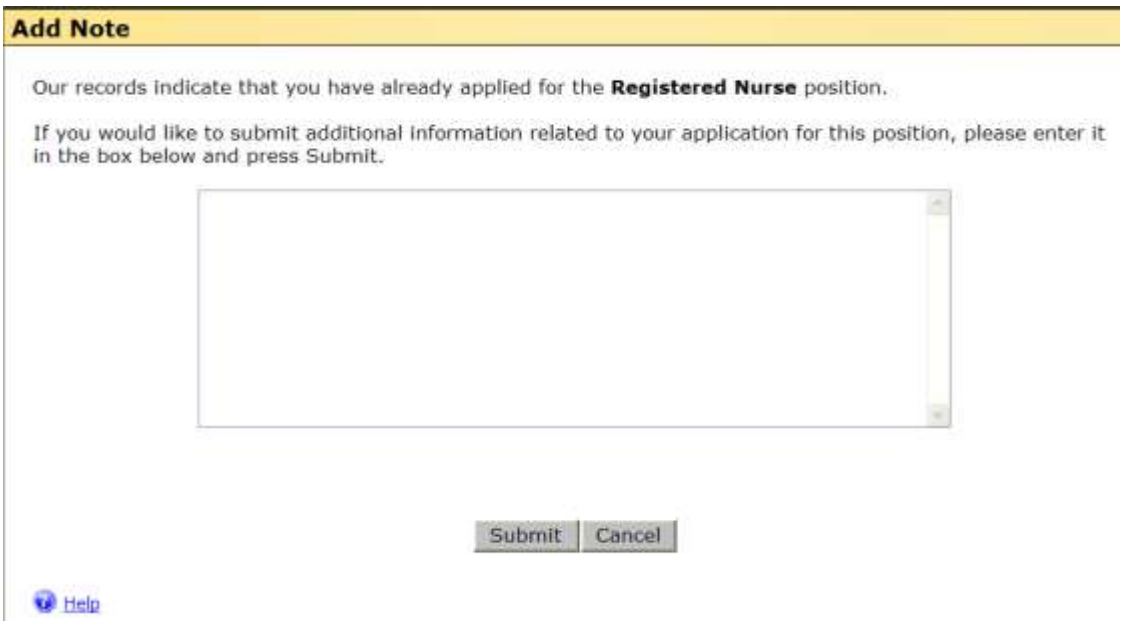
Application Results

Upon successful submittal of the Application, the Applicant will be presented with an *Application Result*. There are two messages which may be displayed. One message is presented if the Applicant successfully passed all pre-screen questions (or if there were no prescreen questions). The other message is presented if the Applicant failed the pre-screen. The contents of the notification used for each scenario is sset up by Greentree Systems. (the actual letter contents for each is set up in *Letters Maintenance).*

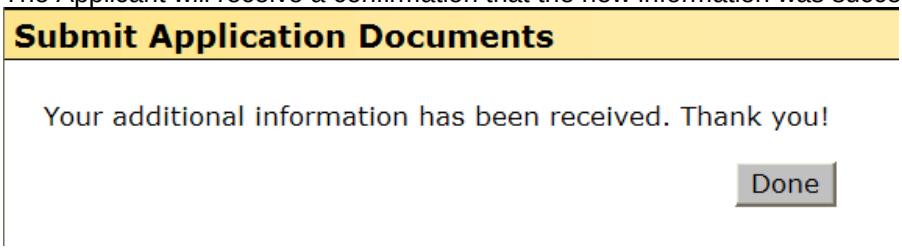

Application Results
Thank you for your application for employment! Your application will be given full review and consideration for this position.
At any time you can click on the My Home Page link above to view the status of all your applications, including this one. If we have your email address, you will also receive an email confirmation for this application.
Again, thank you for applying!
Sincerely,
Human Resources Department
Return to Search
Help

Add Note

If an Applicant tries to apply for a Requisition that they have already submitted an Application for they will be directed to the *Add Note* page. The Applicant is notified that they have already applied, but they can submit additional information for consideration. They can type new information into the text box and click Submit or choose Cancel to return to the previous page.


Add Note
Our records indicate that you have already applied for the Registered Nurse position.
If you would like to submit additional information related to your application for this position, please enter it in the box below and press Submit.
Submit
Cancel
Help

The Applicant will receive a confirmation that the new information was successfully submitted.



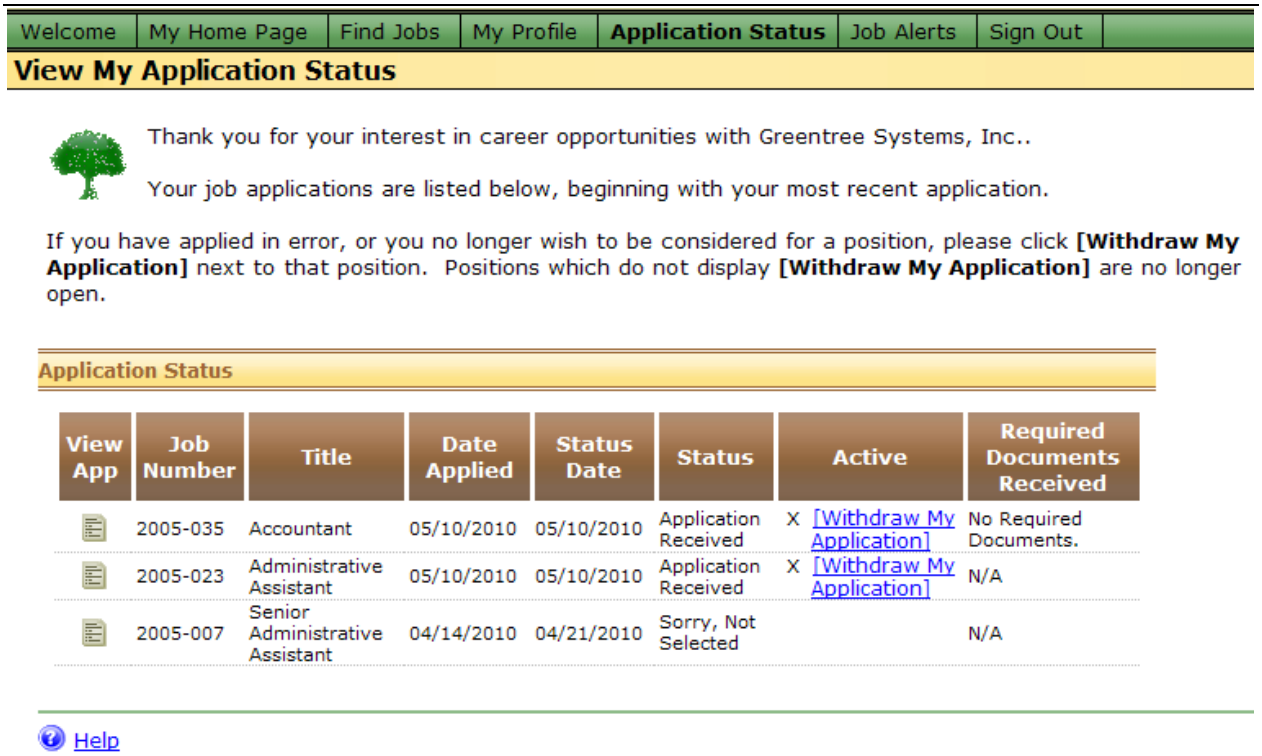
The information is added to the Applicant's *Documents List Attachment* in iGreentree as a *CSSNote*. These notes can be easily found by performing an Advanced Search using a combination of document type and date created or by using the menu item *Attachments* | *Document List* from the Application Edit View form for an Applicant.



Application Status

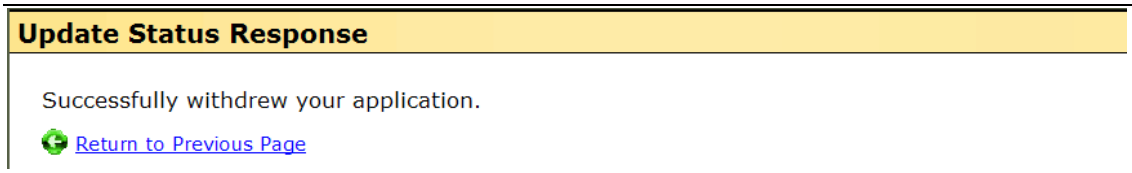
The Applicant can return to the Candidate Self-Service site and *Application Status*. This menu will take the Applicant to a summary of the Applications that the Applicant has previously submitted. The actual status that is displayed to the Applicant is determined by the Applicant's *Result* that is set in iGreentree for that particular Requisition. It is important to note that the *Result* in iGreentree is never seen by the Applicant. Instead, for each *Result* code, the Applicant sees its corresponding 'CSS Description' which is entered in *Codes Maintenance* for each *Result* code.

The Applicant can view a static copy of the actual Application submitted by clicking on located under *View App.*



Withdraw Application

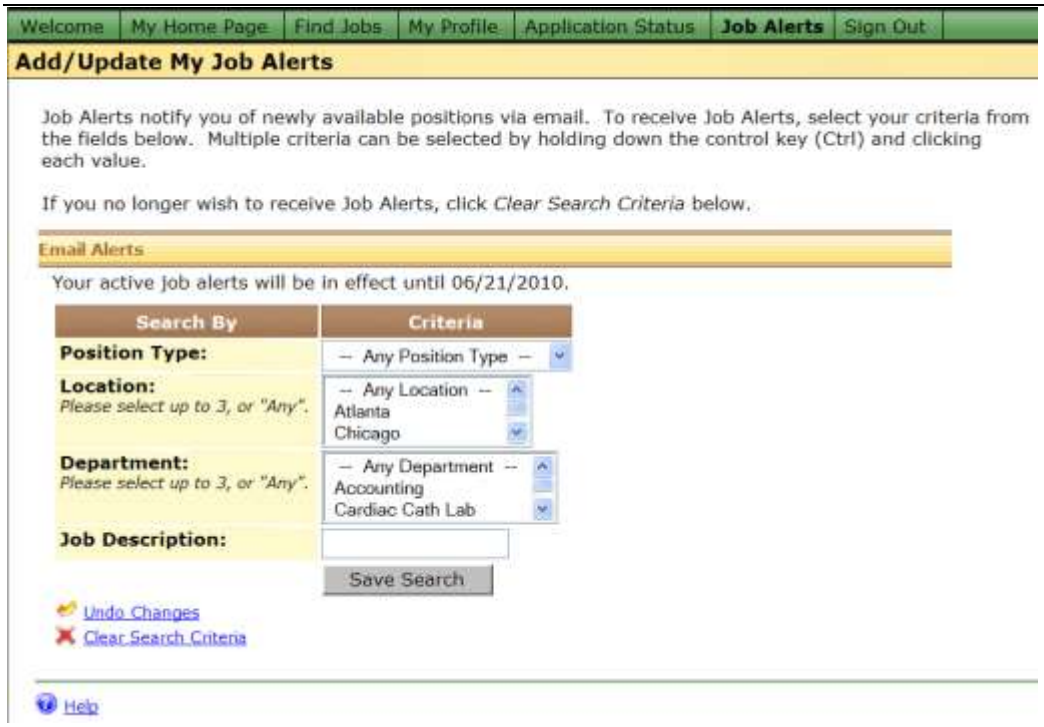
The Applicant has the option to withdraw their Application should they no longer wish to be considered for a position they previously applied for. The Applicant simply clicks the [Withdraw My Application] link next to the position for which they are no longer interested. This process will update the Applicant's *Result* in iGreentree to reflect their decision. This link will only be available if the position is still open and the Applicant has a non-final result. The Applicant will receive a confirmation that the steps taken to withdraw the Application were successful.



Job Alerts

The Applicant has the option to create and edit Job Alerts by going to the menu *Job Alerts*. The Applicant can identify the criteria for the jobs they would be interested in. Once the criteria have been selected and the Applicant selects 

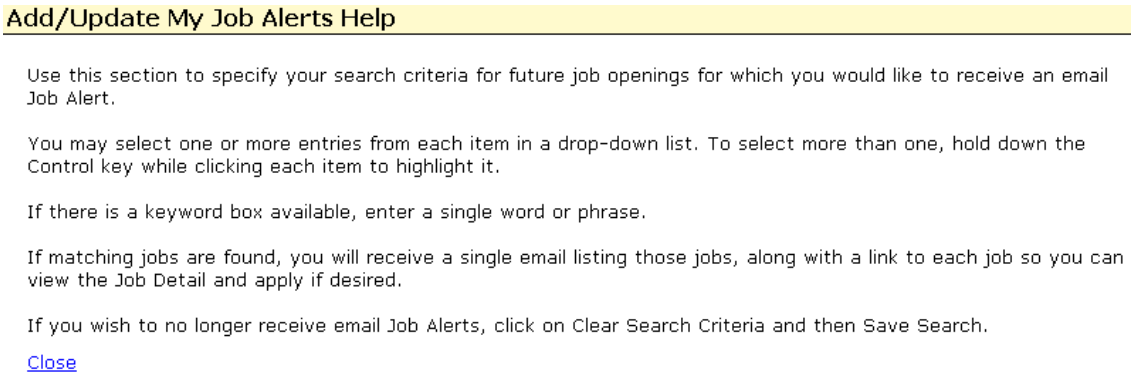
the Alert is activated. Once enabled, alerts will be emailed to the Applicant whenever positions are posted that meet the Applicants saved criteria. Saved *Job Alerts* are activated in iGreentree under the Applicant's *CSS Properties Attachment*.


Welcome
My Home Page
Find Jobs
My Profile
Application Status
Job Alerts
Sign Out
Add/Update My Job Alerts
Job Alerts notify you of newly available positions via email. To receive Job Alerts, select your criteria from the fields below. Multiple criteria can be selected by holding down the control key (Ctrl) and clicking each value.
If you no longer wish to receive Job Alerts, click Clear Search Criteria below.
Email Alerts
Your active job alerts will be in effect until 06/21/2010.
Search By
Criteria
Position Type:
-- Any Position Type --
Location:
Please select up to 3, or "Any".
-- Any Location --
Atlanta
Chicago
Department:
Please select up to 3, or "Any".
-- Any Department --
Accounting
Cardiac Cath Lab
Job Description:
Save Search
Undo Changes
Clear Search Criteria
Help

The length of time an Applicant's Job Alerts will stay active is a setting controlled by each individual company. Each time the Applicant logs back into your CSS Site their "clock" resets and their length of time (default 30 days) starts again. The Applicant can return to CSS *Job Alerts* at any time to inactivate the *Job Alert* by clicking the link Clear Search Criteria .

Help

Throughout Candidate Self-Service the Applicant has access to many help menus. If available, the Help links are typically found at the bottom of a page. The help topics answer many of the common questions about specific areas of CSS.


Add/Update My Job Alerts Help
Use this section to specify your search criteria for future job openings for which you would like to receive an email Job Alert.
You may select one or more entries from each item in a drop-down list. To select more than one, hold down the Control key while clicking each item to highlight it.
If there is a keyword box available, enter a single word or phrase.
If matching jobs are found, you will receive a single email listing those jobs, along with a link to each job so you can view the Job Detail and apply if desired.
If you wish to no longer receive email Job Alerts, click on Clear Search Criteria and then Save Search.
Close

Sign Out

When an Applicant has concluded the use of Candidate Self-Service they can utilize the Sign Out link on the main menu to exit the career site.

Resume Processor & ScanStation

Objectives

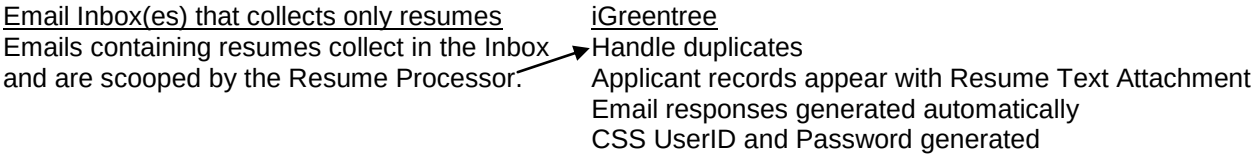
This chapter is for anyone who will be scanning and/or loading resumes. It is also for anyone who wants a greater understanding of how resume data gets into the system. After completing this chapter, Users will be able to:

- Load resumes from email
- Scan and load resumes
- Find Applicants that have been entered
- Handle duplicate Applicants

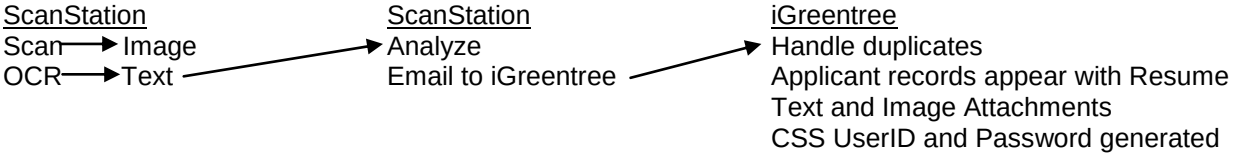
Resume Processor

Resumes are entered into iGreentree via Resume Processor. The Resume Processor can enter either emailed resumes or resumes that have been scanned and processed by ScanStation.

Emailed Resumes


Email Inbox(es) that collects only resumes
Emails containing resumes collect in the Inbox and are scooped by the Resume Processor.
iGreentree
Handle duplicates
Applicant records appear with Resume Text Attachment
Email responses generated automatically
CSS UserID and Password generated

Hardcopy Resumes



Emailed Resumes

Automatic Resume Processing

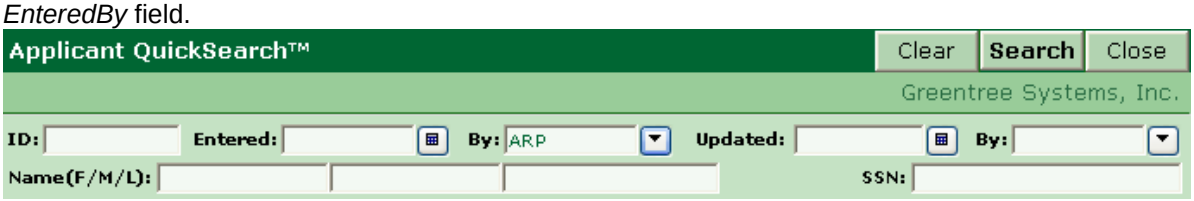
If a special email inbox has been set up to receive only resumes, those resumes can be loaded directly into iGreentree, allowing the system to process them like other resumes but without scanning. See Chapter 10 for instructions on the setup of inboxes in Maintenance under Resume Inboxes.

Resumes cannot simply be pulled from a User's regular inbox because it would pull in all emails (resume or not). Resumes that come to a User's regular inbox can be forwarded into a generic email box for processing.

Automatic Resume Processing (ARP) converts an email (or its attachment) to a Resume Text file, which then becomes an Attachment on the Applicant record that is created in iGreentree. ARP can process resumes with the following types of attachments: HTML, .DOC, .TXT, and .RTF.

Once ARP is set up, the system checks every X seconds (X as defined in system setting on the server) for new emails in the designated inbox. Any emails, which seem to contain resumes, either in the body of the email or as an attachment, will be processed into the system. These resumes are analyzed and processed the same as resumes from ScanStation, finding Name, Address, Phone Numbers, Email Address, Skills, Education, Experience, and Objectives. The emails are removed from the original inbox after analysis.

New Applicant records created by ARP can be found by including ARP in the search criteria in the *EnteredBy* field.



Resumes that the system suspects may be duplicates may be put into an alternate Filing System for later merging, ignored, or merged. (See "Handling Possible Duplicates")

Any emails that the system cannot find Name and Address information on will be forwarded to the email address designated in *Resume Inboxes* Maintenance. The person who receives these emails can then fix the name and/or address problem, and forward them back to the email inbox for re-processing. For information regarding the handling of erred resumes, please refer to *Handling Erred Resumes.*

The system can also automatically email a letter to Applicants who were entered via ARP, as set in *Resume Inboxes* Maintenance. The automatic response occurs when a resume is accepted into the system. *The automatic response cannot include any specifics such as job title, since there is no data established at this point in the process to pull it from.*

If desired, the system can automatically generate a unique CSS UserID and Password and e-mail the information to the Applicant. For this feature to work properly the Applicant must have an e-mail address on their resume. The UserID and Password can be changed by the Applicant at any time when they visit your CSS Site.

Scanning Hardcopy Resumes

Resumes that are received in the mail or via fax will need to be scanned to get them into iGreentree. This process is done in a module called iGreentree ScanStation, which must be installed directly on the computer that the scanner is attached to.

Scanning Process

There are two major steps to processing hardcopy resumes:

1. Scan the physical resume using the ScanStation program.
2. Load the scanned resume into the iGreentree database via email.

There are some smaller steps within each of the above. For each of the steps, decide whom, when, and how. Although some decisions must be made before beginning to scan live resumes; the process can be changed later as needed.

The Time Factor

On average, the start-to-finish process of getting resumes into the iGreentree database by a single person should produce at least 20 to 30 finished records per hour. This process includes opening

envelopes, removing staples, and collating pages in the document feeder, scanning, verifying, loading the record to iGreentree, adding basic recording data (such as source, recruiter, and status) and saving the record. *This estimate also assumes recommended minimums for the scanning workstation, a well-maintained quality scanner, a responsive network, an average of 1½ pages per resume, and a proficient operator*

Options for increasing resume throughput include:
- Using a faster scanner
- Using multiple scanners simultaneously
- Assigning additional staff to help resume processing
- Multiple inboxes to take advantage of Templates
- Using smaller Thesauruses with relevant skills and education
- Minimizing the number of synonyms for each code
- Using the automatic options (in the Folder Properties)
- Encouraging Applicants to apply electronically (email or CSS)
- Having resumes scanned and OCR'd by an outside source
- Scanning some resumes and entering other Applicants manually

See the Scanning Decisions Checklist (at the back of this manual) for additional decisions that should be considered for scanning.

Scanning Goals

What needs to be accomplished through the scanning of resumes? Think about:
- Will resumes be routed to managers via email?
- Will acknowledgment letters or emails be sent to all Applicants?
- Who is available to sort through paper?
- How will paper physically flow through the office?
- Do ALL resumes that come in need to be scanned, or will a pre-screen for possible candidates be done first?

Pre-Screen, scanning only "Interest" resumes	OR	Scan ALL resumes that are received
Recruiters sort into "interest" & "no interest."		All resumes are scanned immediately upon receipt.
Recruiters get resumes sooner, may hoard or delay.		Scan & OCR steps take longer, data into system sooner.
Much less time spent on data entry.		Time is spent verifying data that will be of little use.
Letters & postcards may be delayed due to later entry.		All letters and postcards are sent out in a timely manner.
More paper shuffling. Resumes are handled twice.		"The Paperless Office" is closer to a reality.
"No interest" Applicants may be entered manually.		More storage space is required on the server.
Only data that has value is stored in the system.		All data for all Applicants is in the system.

If a large volume of hard copy resumes is anticipated, Greentree Systems recommends pre-screening for the most efficient use of the system. For resumes that are not scanned, minimal Applicant data can still be hand-keyed.

Preparing the Resumes for Scanning

- (Optional) Set aside "no interest" resumes for manual entry of name and address
- Sort the remaining resumes into piles for Folders
- Carefully remove all paper clips and staples from the resumes
- Smooth out the paper and make as wrinkle-free as possible
- If the cover letter needs to be scanned as well as the resume, place it behind the resume to avoid erroneous data populating in the name and address fields.

- Separate resumes with blank sheets of paper
- A blank sheet of white paper should be placed in between each resume. This enables the scanning software to recognize that a resume is ending and a new one beginning.
- Do not write on the front of resumes that are to be scanned.
  - Do not "date stamp" the front of the resume unless it is okay for this date to be visible in the scanned record (if so, Greentree Systems recommends stamping at the bottom).

Place a group of resumes in the document feeder as per the scanner manufacturer's instructions. The instructions will typically specify the amount of paper that the document feeder is able to handle. *Since resumes are on various types of paper that vary in thickness, a good rule of thumb is to put fewer pages of paper in the feeder than the manufacturer suggests.*

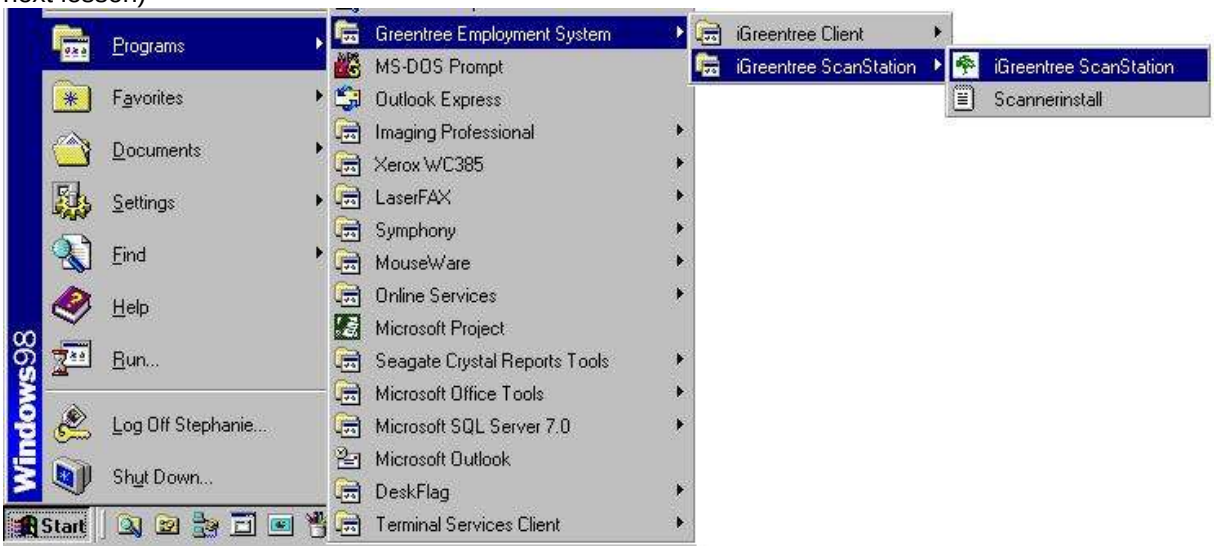
iGreentree ScanStation is utilized to scan and OCR (optical character recognition) resumes. The OCR technology takes the scanned image and creates a text version of the resume that can be used to create and populate an Applicant's record within iGreentree.

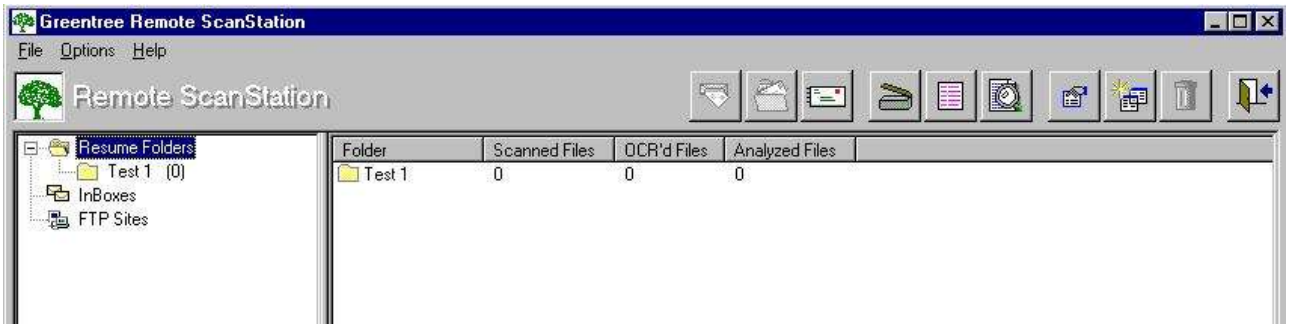
Using iGreentree ScanStation

Make sure the scanner is turned on before the computer is turned on. If it is not, the User may need to reboot their computer after turning on the scanner. It is suggested that all other Applications be closed prior to beginning the scanning process.

iGreentree ScanStation is utilized to scan and OCR (optical character recognition) resumes. The OCR technology takes the scanned image and creates a text version of the resume that can be used to create and populate an Applicant's record within iGreentree.

To open iGreentree ScanStation, go to the computer's Start Menu under Programs. Click on Greentree Employment System and choose iGreentree ScanStation. (A scanner must be attached to practice the next lesson)



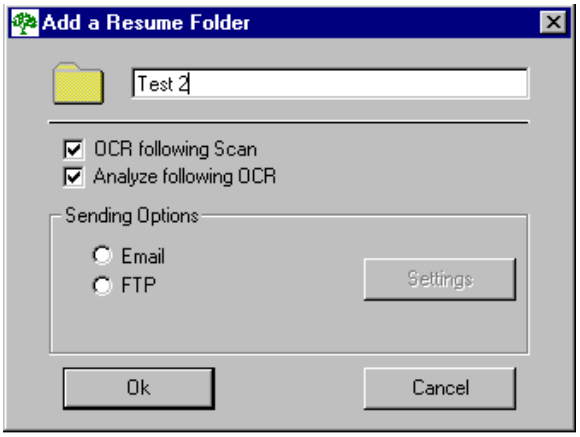


Resume Folders

If there are no Folders displayed under Resume Folders, create a new Folder.

 or Alt+A or File|Add New Folder

Enter information in this window as shown below:



Make a name for the Folder. Separate Folders may be needed for different kinds of resumes, with different options below.

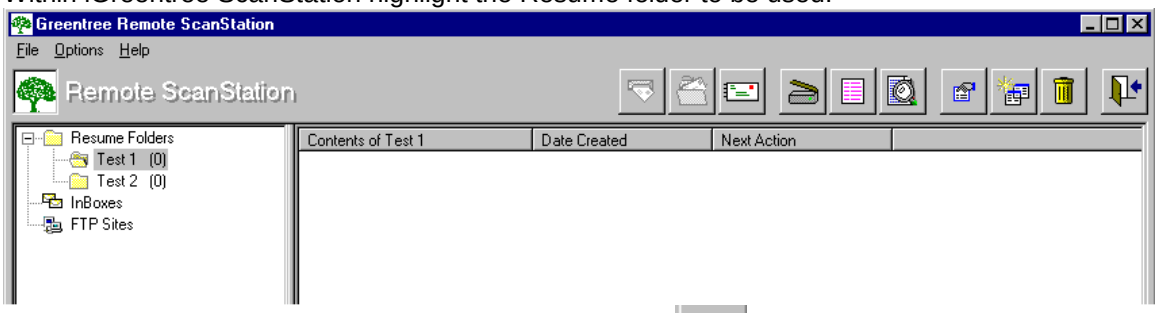
If *OCR following Scan is selected*, each Folder will immediately OCR right after it finishes scanning. However, if this option is off, a group of Folders can be selected to OCR all at once. OCRing all at once may be more efficient since OCR can run without supervision and allows Users to use their computer for other things while it runs the OCR process.

Analyze following OCR will automatically start the Analyze step following the completion of the OCRing of the resumes.

Scanning

Take the resumes that were prepared for scanning and place them in the automatic document feeder.

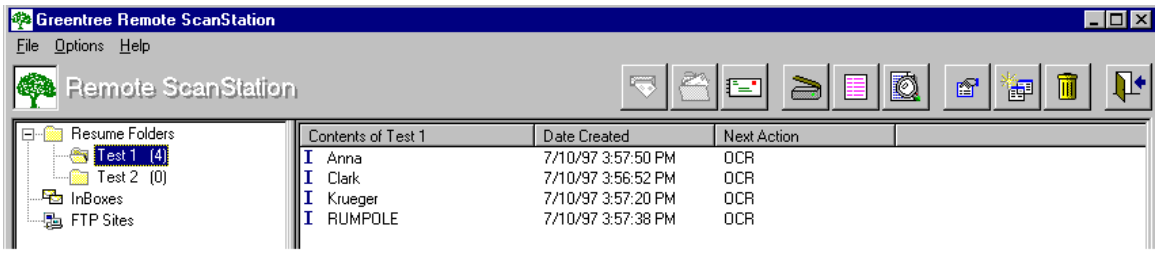
Within iGreentree ScanStation highlight the Resume folder to be used.



Click on the *Scan* button to begin the scanning process. 

If the scanner becomes jammed and the scanning stops, the Scan button may need to be selected again to restart.

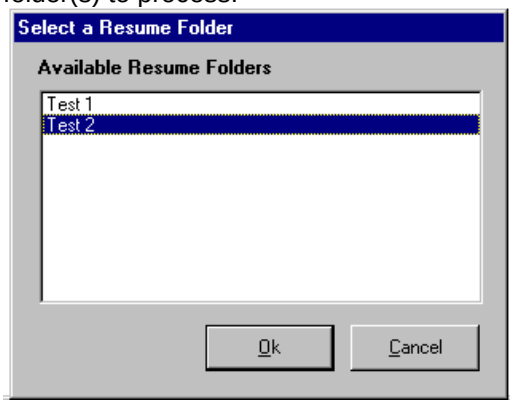
An image file will be created for each resume. They will display in the folder details with an "**I**" (for image) next to them. The next action will display as OCR.



If the *OCR following scan* option is on for the folder, the system will automatically continue to process the resumes. If the option is not on, the User must choose the next step to OCR the resumes.

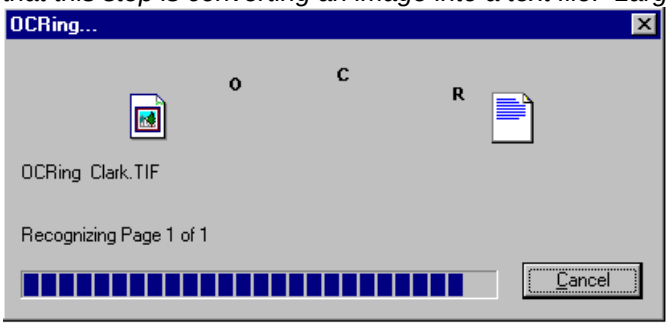
Optical Character Recognition

Click on the *OCR* button  to manually begin the OCR process. The system will prompt for which folder(s) to process.

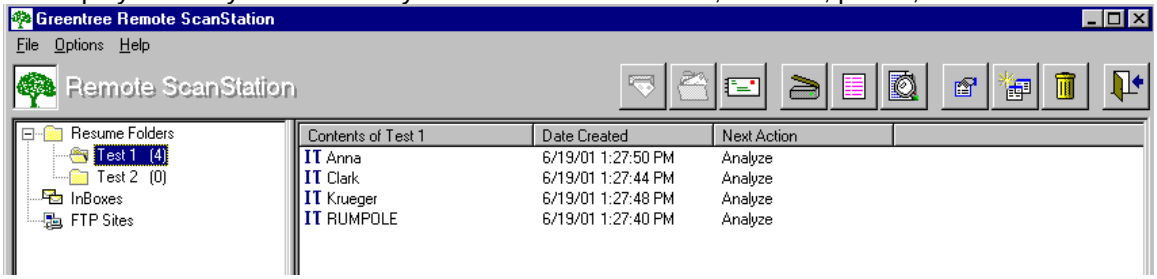


In our example there are several folders ready for OCR. Several can be OCR'd at once or one at a time.

The *OCRing* window will appear and the User will be able to monitor the system's progress. *Remember that this step is converting an image into a text file. Larger groups of resumes will take longer.*



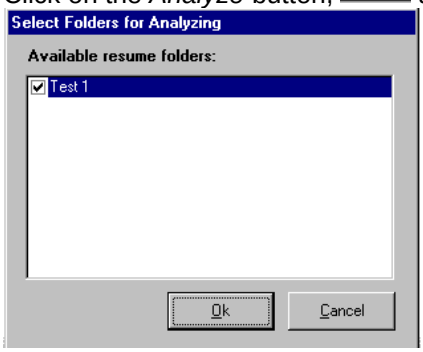
The resumes will now display in the Folder, preceded by **I** (for image) and a **T** (for text). The next action will display as Analyze. Now analyze the resumes for Name, address, phone, etc.



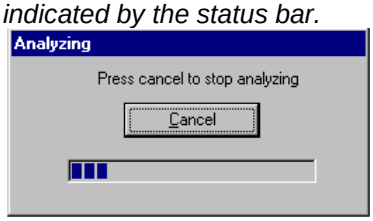
If the *Analyze following OCR* option is on, the system will automatically continue on to the Analyze step. If this option is not on, manually start the process by proceeding to the next step.

Analyzing Resumes

Click on the *Analyze* button,  and then choose the folder(s) to be used.

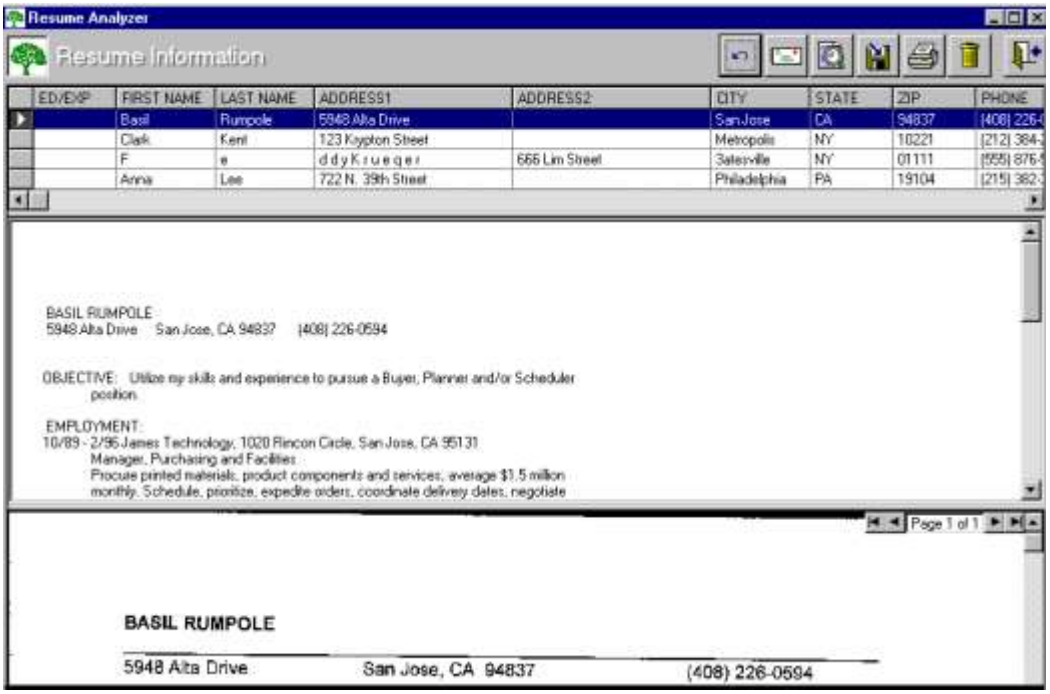


The system will begin analyzing the resumes. It will search the text file that was created in the *OCR* step and try to find Name, Address, Phone, etc. *The progress of the Analyze process can be monitored as indicated by the status bar.*



The resumes will display on the computer screen in three sections:

- The analysis information appears in the top section.
- The resume Text appears in the middle
- The resume image (if an image is present) appears in the bottom



There are several icons in the Analyze screen.

 *Undo Changes* allows Users to revert back to the previous text.

 *Send Selected Resumes* transfers the corrected resumes into iGreentree

 *Re-Analyze* can be utilized to update the display results in the analysis window if changes were made to the text.

 *Output to File* will create a text (.txt) or Rich Text Format (.rtf) file that displays the names and addresses of the resumes. This option can be used prior to sending.

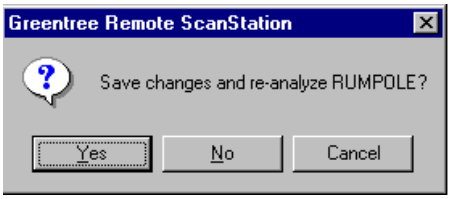
 *Print Analysis Results* will prompt for printer information, then print a list of all the resumes. It may be helpful for a remote site to keep this list of what was sent. This option can be used before sending.

 *Delete Resume* may be needed when the same resume accidentally gets scanned twice, or for some reason a file exists that should not be processed into iGreentree.

 *Close* the Analyze window to return to the main iGreentree ScanStation window, where the entire Folder of resumes can be sent at once.

To assist the system in finding accurate contact information (name, address, phone, and email) fix any errors that may have occurred within the resume text section (center window). The image can be viewed from the bottom window to help (or use the hardcopy resume if it is handy).

After fixing text, Re-Analyze by choosing the *Re-Analyze* button  . The system will prompt to Save the changes. The system re-reads that Text file each time the User Re-Analyzes; using whatever text is there at the time. Choose *Yes.*

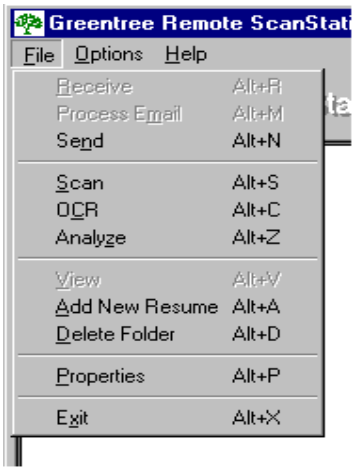


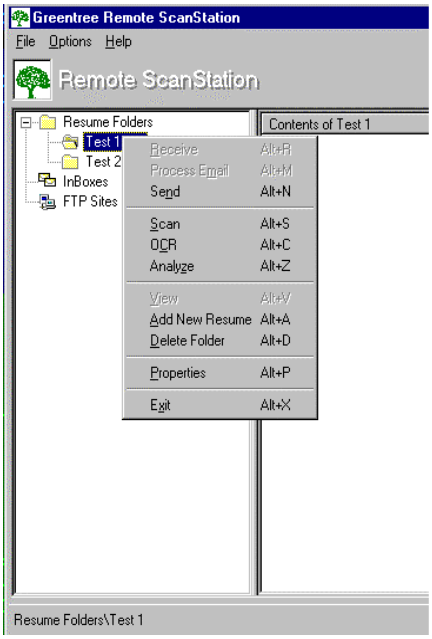
The next step is to *Send* the resumes to iGreentree.

Sending Resumes Setup

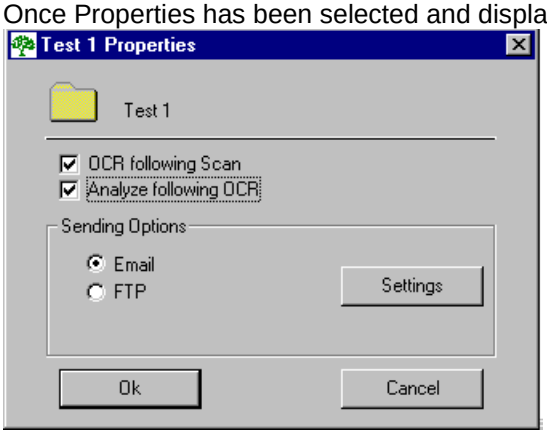
To send via email, the option must be turned on in ScanStation, and the User must enable the Property for email sending for the selected Resume folder.

Access the properties by highlighting the Folder and then going through the File Menu and selecting Properties. Or right click on the Folder and select Properties.

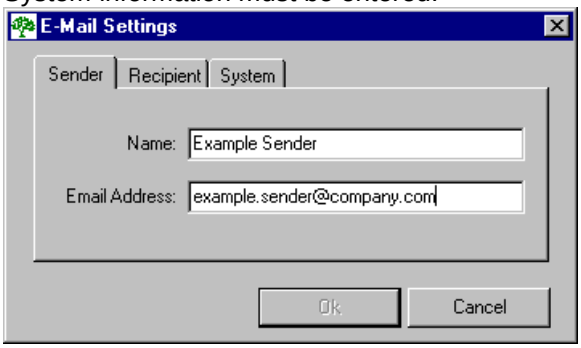




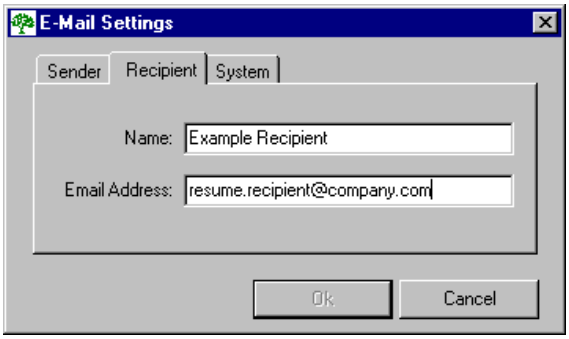
Once Properties has been selected and displayed, select *Email* as a *Sending Option*.



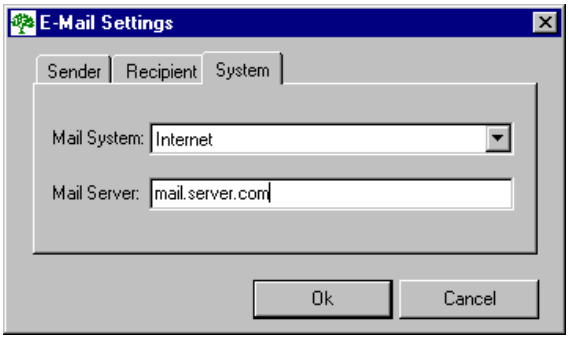
Once Email is selected, click on *Settings* to enter the email information. A Sender, a Recipient and System information must be entered:



Name: User's name
Email Address: User's email address



Name: The name of the generic mailbox being used to receive the resumes
Email Address: Email address where resumes are being sent (usually a generic account)



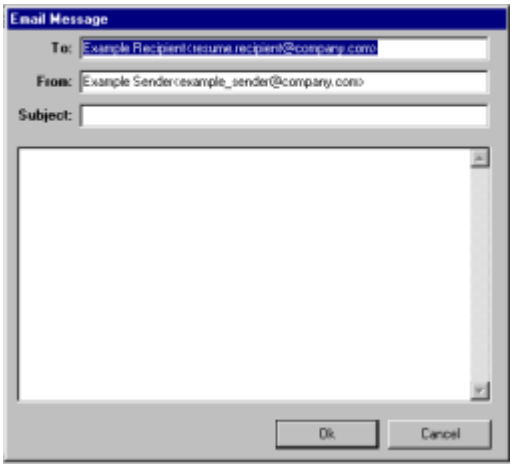
Mail System: Internet Email or MAPI (MAPI is no longer a used format, Internet Email should be selected)
Mail Server: Address where your mail server is located

Sending Resumes

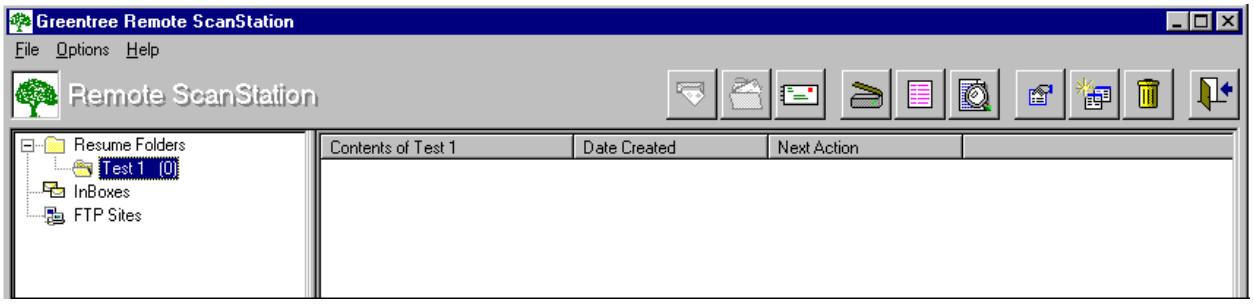
When finished reviewing and making any necessary changes the User should use the exit button (door icon) to return to the main page. To send resumes, first highlight the Folder to be sent.

 Choose Send Selected Resumes

A window will appear for the email. A subject can be created or a message entered. If automatic logging to req is enabled in *Inbox Maintenance* the User can designate a Requisition number in the subject line of the email and all Applicants in this folder will be logged to that Requisition if it is open. Choose OK to send.



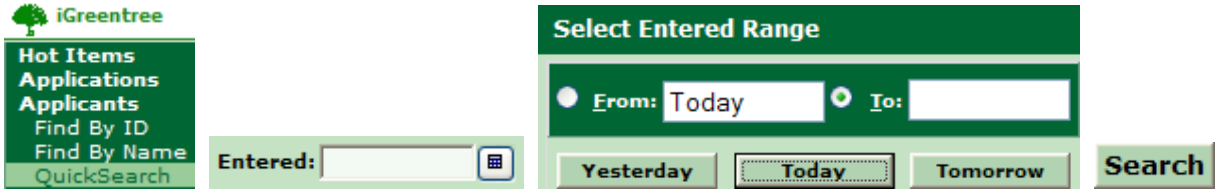
After choosing OK, a message will flash confirming that the sending is completed. The resumes disappear from the Folder because they have been sent into iGreentree for processing into Applicant records.

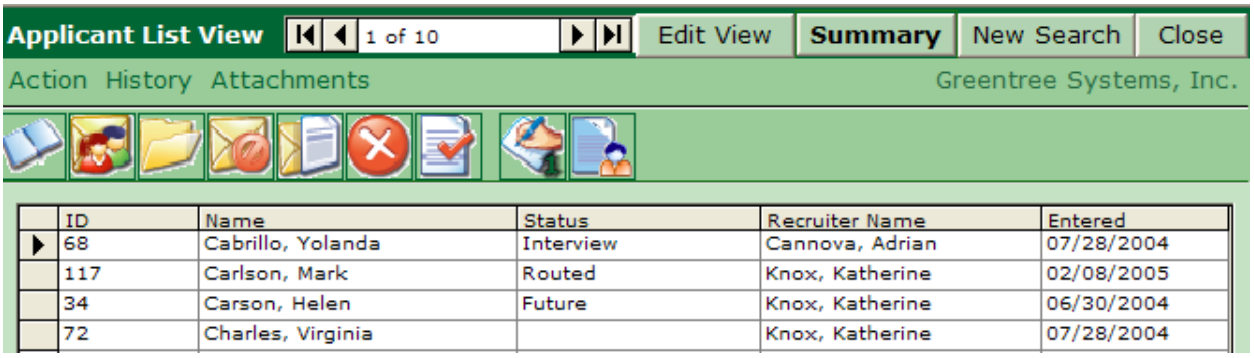


Checking the Data in iGreentree

Exit ScanStation and open the iGreentree database.

Perform an *Applicant QuickSearch* to find the Applicants entered today.





ID	Name	Status	Recruiter Name	Entered
68	Cabrillo, Yolanda	Interview	Cannova, Adrian	07/28/2004
117	Carlson, Mark	Routed	Knox, Katherine	02/08/2005
34	Carson, Helen	Future	Knox, Katherine	06/30/2004
72	Charles, Virginia		Knox, Katherine	07/28/2004

An Applicant record has now been created from each Resume. Some of the information found is on the base record; other parts of the information are in Attachments. If the User did not verify the Name, Address, Phone and Email (NAPE) information earlier, the name and address should now be verified for accuracy from the *Edit View*, correcting as necessary. Other information may also be checked and/or corrected if it will be searched on frequently within iGreentree, such as the *Education Summary* (in Attachments).

The Attachments that may have gotten information from the Resume include:

- Experience Summary
- Education Summary
- Resume Text
- Resume Image
- Skills
- Objectives

At this point the User can perform Actions for these Applicants, such as *Log to Source, Send Letter, Log to Req,* and/or *Route. Actions* will be discussed in the Applicant Processing Chapter.

Applicant ID numbers can be written on the hardcopy resume, and perhaps filed by ID numbers if it is necessary to keep the paper copy of the resume. Many organizations discard the original hardcopy resume at this point. Since they save images, they can always re-print an identical copy from the Resume Image.

Handling Possible Duplicates

As with the manual entry of Applicants, occasionally Users will run into an Applicant who has previously sent in a resume. For resumes, organizations have three options for how to handle duplicates:

- Ignoring Duplicates
- Using a Separate Filing System
- Merging Duplicates

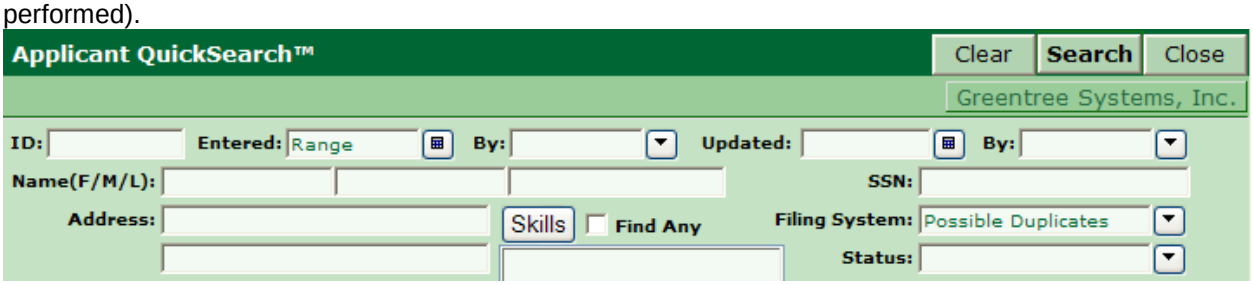
Ignoring Duplicates

Some organizations choose to ignore duplicates and allow the system to create a new record each time an Applicant applies. The downside to handling duplicates in this manner is that it is much more difficult to review an Applicant's history. Multiple records will need to be reviewed in order to get a clear picture of what has happened throughout the person's history of applying.

Using a Separate Filing System

Any Applicants that the system perceives as possible duplicates can be put into a special Filing System as they are loaded into iGreentree. This is possible if, in *Inbox Settings* Maintenance, *Duplicates Processing* is set to "Use Alternate Filing System" and *Duplicate Filing System* is set to a specific Filing System (such as *Possible Duplicates*).

Someone should be assigned to performing the periodic task of checking these records to see if there are truly duplicates, and updating the records accordingly. Start by searching for Applicants who are in that Filing System, and were entered during a specific time period (since the last time this function was performed).



After finding the list of possible duplicates, switch to 

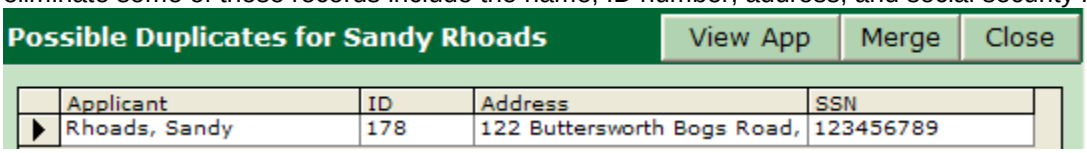
.

Merging Duplicate Records

Now a determination can be made for each Applicant, one by one, whether they are already in the system, or an entirely new person. From the *Action* menu, choose *Duplicate Check.*



One or more possible duplicates will appear at the bottom of the screen. Clues to help immediately eliminate some of these records include the name, ID number, address, and social security number.

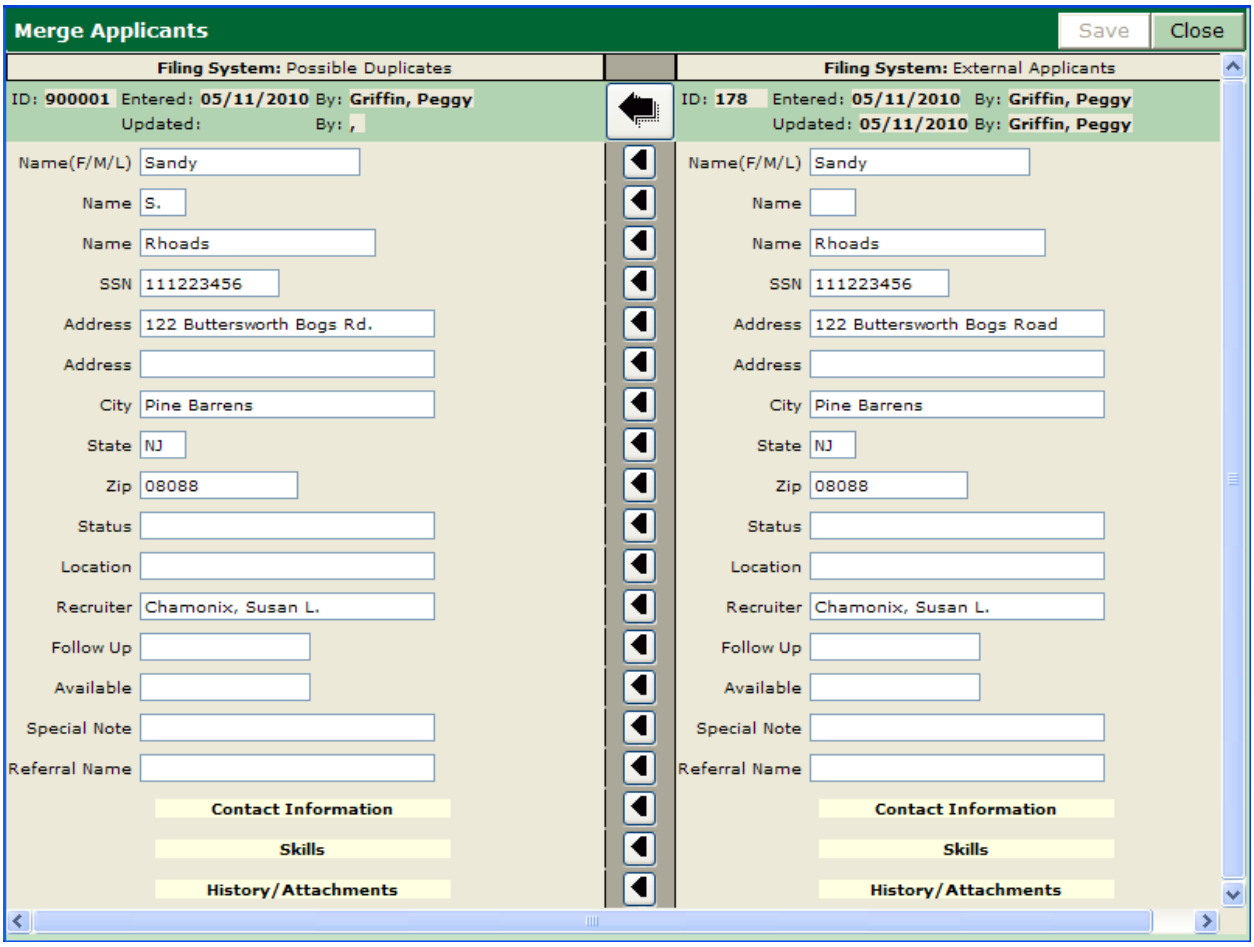


If anyone on the list appears to be the same person as the new record, select that record, and then display the possible duplicate using the View App button. Another window opens to display the existing record. Windows can be re-sized and re-arranged to display both the old and new records for comparison.

A new *Applicant Summary* window opens to display the old record that was already in the system. The record from the *Possible Duplicates* Filing System is still in the background.



If the old record still appears to be the same person as the new record, choose the Merge button. A new window will appear, allowing both records to be viewed for updating as needed.



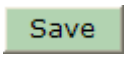
The existing record is displayed on the left; the new data is displayed on the right. If this is the same Applicant, the User should update the existing Base Record. If this is not the same Applicant, close the window to get back to the Duplicate screen and pick a different possible duplicate.

Let's assume this is the same person who re-applied. Select the  arrows to move the information from one field on the new Applicant to the same field on the existing Applicant.

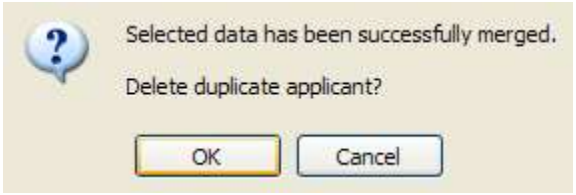


Or select the large arrow to move ALL of the information from the new Applicant to the old Applicant.



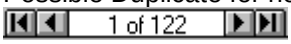
When 

is selected a confirming message will be displayed.



The records are combined, with appropriate data updated as selected.

If none of the people on the list is the same person as this new Applicant, just leave this record as a Possible Duplicate for now, and use the *Navigation Box* to continue to the next Applicant.

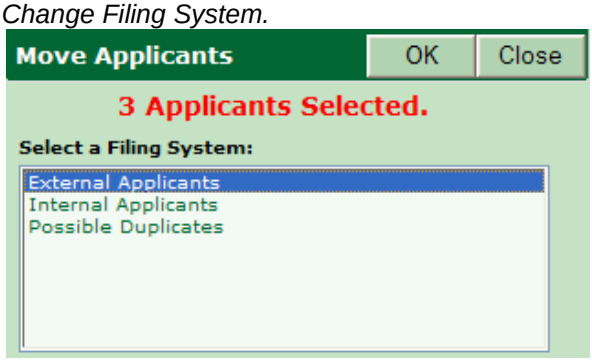


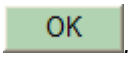
Moving Non-Duplicates to New Filing System

After checking all of the records in the list, Merging when appropriate, there may be one or more records left, records which turned out NOT to be duplicates. *The non-duplicates then need to be moved to the correct Filing System.*

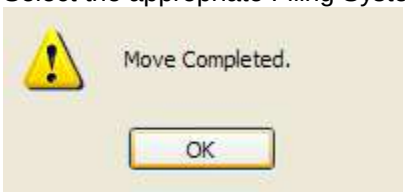
From the *Action* menu, choose *Change Filing System.*





Select the appropriate Filing System, and then choose 

.



The Applicants that were still displayed in the list are now moved to the correct Filing System. They are assigned a new ID number, which fits in the range of ID's for that Filing System.

Finding Applicants that were Entered

HR people will need to find out which Applicants were entered. Periodic searches by Entered Date will find the new Applicants, and allow HR to enter additional data and record the activity of the Applicant.

Within iGreentree, choose *Applicant QuickSearch.* Use the *Entered* Date field to find Applicants that were entered within a specific time period. Search for Applicants entered *Yesterday* to *Today.*



Once new Applicants are found, the User can add or change data and/or Attachments, and perform Actions as needed.

Handling Emailed Resumes

Rejected Emails

An email that has been picked up by one of the defined iGreentree ARP (automated resume processing) inboxes and was not accepted is a rejected email. When an email has been picked up by the resume

processor it tries to find the minimum acceptance information, as defined by *Resume Min Flds* in *Resume Inbox Maintenance*. If it cannot find this information, the resume will error-out and then forward into the inbox that is designated for *Notify On Error* in *Resume Inbox Maintenance*.

Greentree recommends that the *Notify On Error* inbox be monitored and reviewed regularly. Once the Application has been in use for a while, it may be appropriate to monitor the *Notify On Error* inbox more or less than once a week, depending on the number of emails that error.

When an email is taken from the inbox the processor will open any attachments, convert the contents to rich-text (.rtf), and review the contents. As part of the review the resume processor looks at the beginning of the resume for text formatting that resembles a standard U.S. address, much like the following:

Firstname Lastname	OR	Firstname MI. Lastname
# Street Address		# Street Address
City, ST 12345		City, ST 12345-1234

If it is unable to identify the above information, the email will automatically be sent to *Notify On Error*.

Before the email is resubmitted, some decisions need to be made.
1. Is the email that erred a valid resume or is it an unsolicited email advertisement?
2. If it is a valid resume, why did it error out? What modifications need to be done prior to re-submitting?

If the erred email is not a valid resume, the message can be deleted. If however, the resume is valid, the following should be reviewed:

1. **What is the formatting of the Applicant's contact information?** The reason for an erred resume is usually because a complete name and address, including City, ST ZIPCode, at the top of the resume could not be recognized. The most common culprits for this scenario are: The Applicant's contact information was included as the document *Header* or as an image, or the address information is not included or is not in standard U.S. format i.e. a foreign address.

   Resolution: The most efficient way to correct this is to manually type the contact information into the body of the document or email, and remove the image and/or *Header.* When typing the contact information, be sure it is contained within the first few lines and follows the above format.

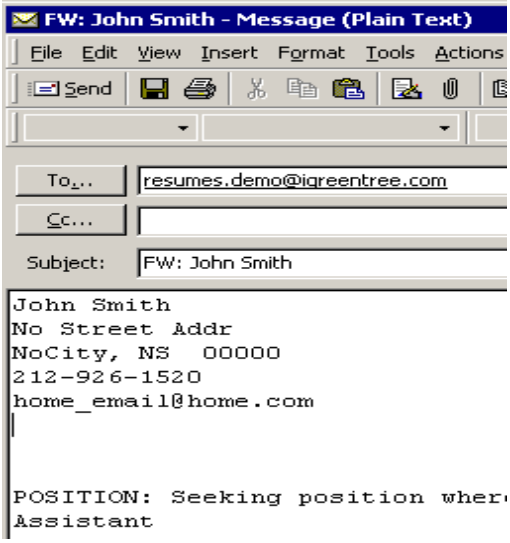
   If the Applicant did not include street address information or resides in a foreign country, Greentree recommends the following to 'trick' the processor into accepting the resume. For address information not included, type in the following as a fake address:
   No Street Addr
   NoCity, NS 00000

   (IMPORTANT: Do not use the word 'Address' on the address line - this is a reserved word used by the processor.)

   For Applicants who live in a foreign country, type in the following as a fake address above the "real" one:
   Foreign Street Addr
   ForeignCity, FS 00000

   Having a consistent fake address that is used for processing erred resumes will assist recruiters when an Applicant is being considered. In seeing a 'No Street Addr' they will know to look for another way to contact an Applicant. In seeing a 'Foreign Street Addr' they will know to look at the *Resume Text* attachment to get the Applicant's real address information.

Once the contact information has been corrected, the document and/or email should be emailed to the original inbox address for processing.



2. **Is the file attachment of a format that is accepted by iGreentree?** The file formats that are accepted include .doc, .txt, and .rtf. HTML is also accepted but not consistently, as the HTML coding picked up by the processor can cause a resume to error out.

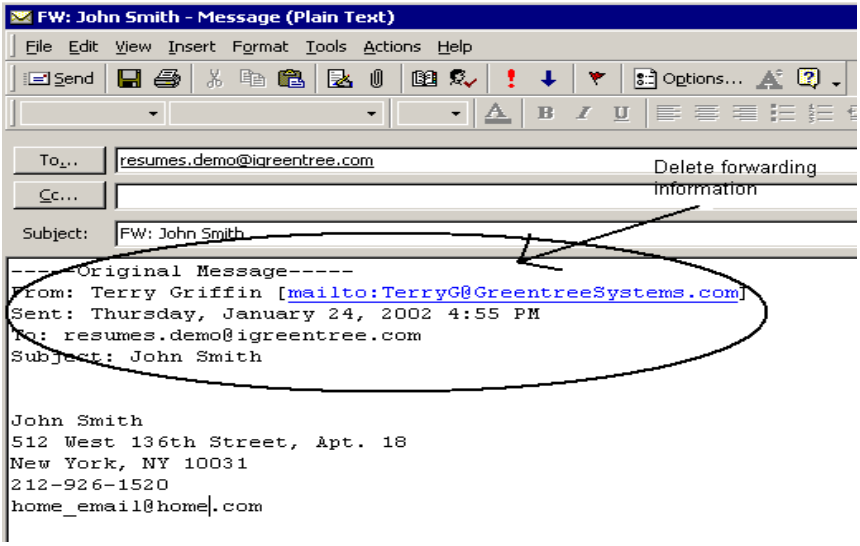
   Resolution: Highlight all of the text within the resume and copy it. Next, create a new email message and paste the resume text into the body of the email message. Verify that the Applicant's name and address format is okay and send the new email to the original inbox address for processing.

3. **Is there more than one attachment, i.e. cover letter and resume?** Often times a cover letter will not have an Applicant's contact information in an acceptable format or it will have the hiring company's contact information at the top rather than the Applicant's.

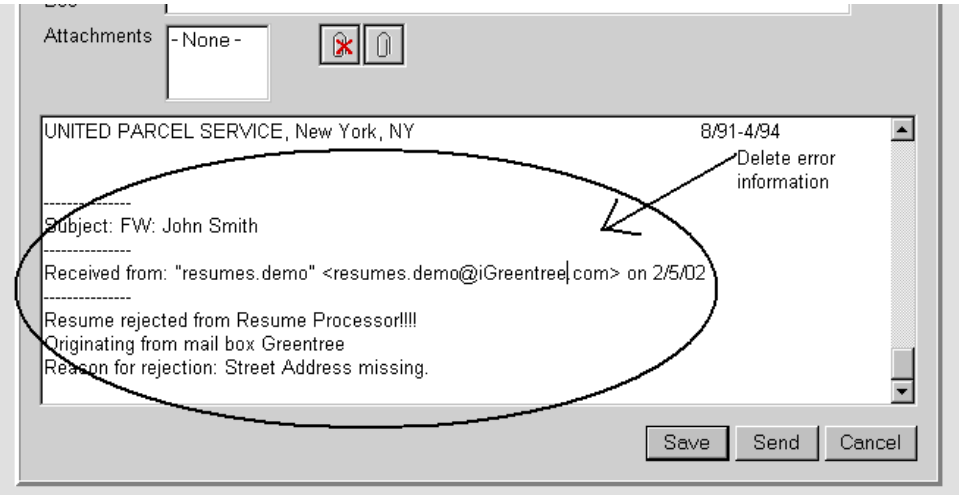
   Resolution: Cover letters, references, etc should be appended after the resume. To correct these, copy all of the resume text into the body of a new email message. Next, copy the cover letter or any other attachment, and paste the information to the email message after the resume. Once all information has been copied into the new email message, verify that the Applicant's name and address format is okay and send the email to the original inbox address for processing.

Some tips for handling erred resumes that are being forwarded directly back to the inbox address are:

1. Remove any/all of the forwarding information that is entered in the email message by default.



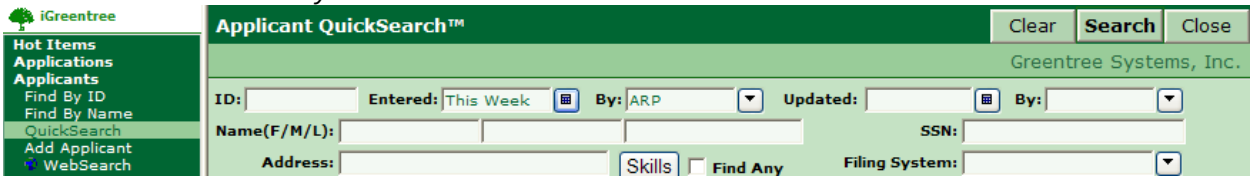
2. Remove any/all of the error information that is appended at the end of an erred resume by default. The reason for rejection may only give a part of why the resume was rejected.



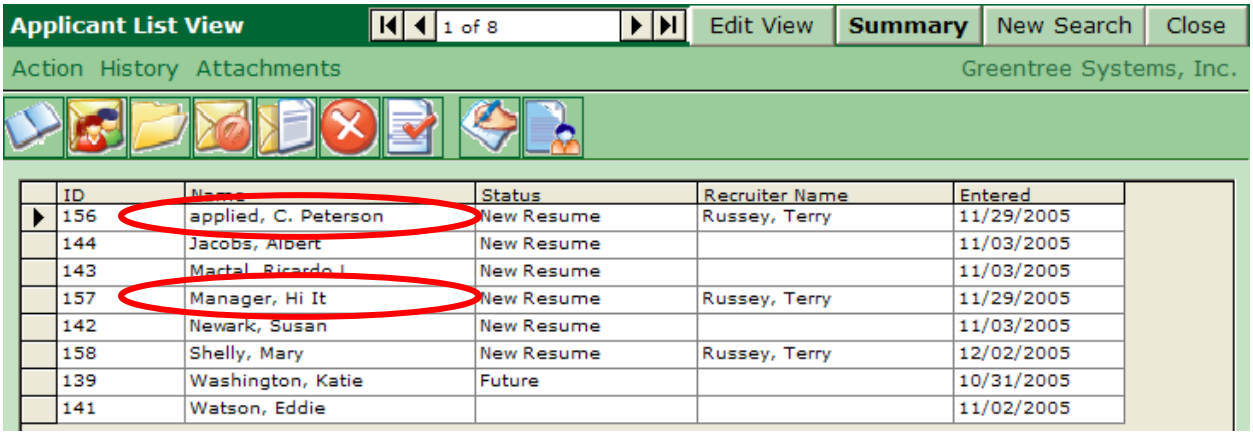
Accepted Emailed Resumes

An accepted emailed resume is a resume that has been emailed to one of the defined iGreentree ARP (automated resume processing) inboxes and was accepted, however incorrect Applicant information was identified by the processor. Greentree recommends that a weekly search be performed to identify all emailed resumes that had incorrect Applicant information extracted.

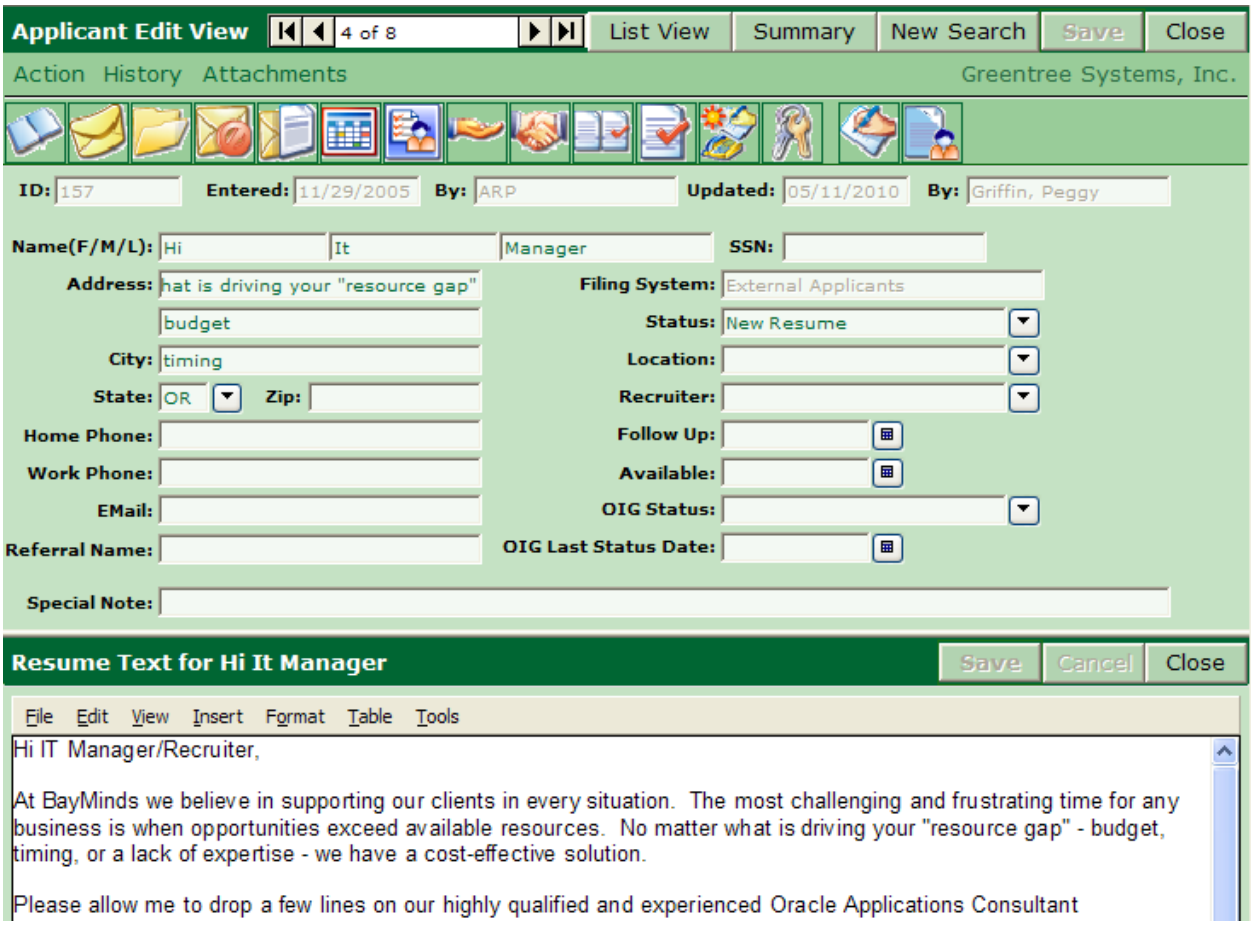
To isolate the records of interest, go to the Applicant QuickSearch form and enter the weekly date range and *ARP* as the *Entered By*.



The returned results should then be reviewed for Applicant names that are not real Applicant names.


Applicant List View
1 of 8
Edit View
Summary
New Search
Close
Action History Attachments
Greentree Systems, Inc.
ID Name Status Recruiter Name Entered
156 applied, C. Peterson New Resume Russey, Terry 11/29/2005
144 Jacobs, Albert New Resume 11/03/2005
143 Mactal, Ricardo I New Resume 11/03/2005
157 Manager, Hi It New Resume Russey, Terry 11/29/2005
142 Newark, Susan New Resume 11/03/2005
158 Shelly, Mary New Resume Russey, Terry 12/02/2005
139 Washington, Katie Future 10/31/2005
141 Watson, Eddie 11/02/2005

While reviewing the list of Applicants entered *This Week*, any Applicant whose *Name* doesn't seem to be a real name should be brought into *Edit View*. In the above example, Applicants: *applied, C Peterson,* and *Manager, Hi It.* Once in *Edit View*, go to the *Resume Text - Attachment,* verify the appropriate Applicant information and make the corrections on the base Applicant form as needed. When completed, select the *Save* button and proceed to the next Applicant record. If however, the Applicant is not truly an Applicant, as is the case of *Manager, Hi It,*



Make note of the Applicant ID number and perform a new *Applicant QuickSearch* using the non-Applicant's ID criteria and perform the *Purge* action. Please refer to the User's manual section on *Purging* for details.

Only the most common scenarios for handling erred resumes have been presented here. If more assistance is needed, please contact Greentree Systems support at support@greentreesystems.com or by calling (800) 348-8845.

Applicant Processing

Objectives

This chapter is for anyone who will enter Applicant data directly into iGreentree or who wishes to become better acquainted with the fields on the Applicant base record and the use of those fields. After completing this chapter, Users will be able to:

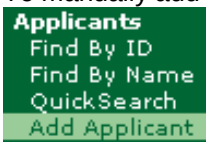
- Add an Applicant manually
- Update information
- Use iGreentree to help with screening
- Display and use History

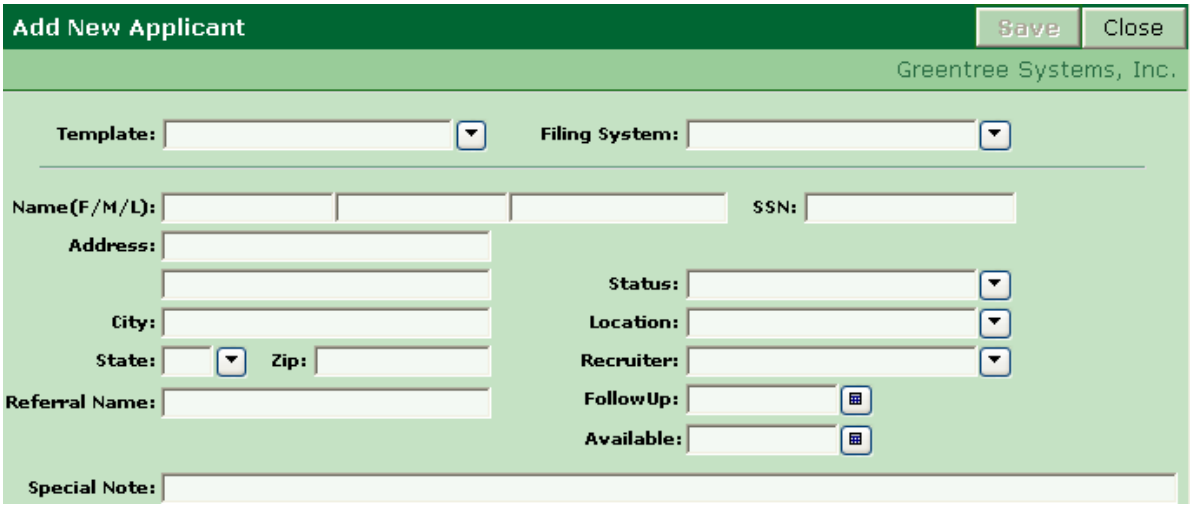
Entering Applicants Manually

If your organization has either the Candidate Self-Service or Resume Processing module, most Applicant information will be initially entered through one of those. However, the Recruiting department will want to record and maintain other Applicant data, and there may be some information that can only be entered by HR. If the CSS and Resume Processing modules are not being used then the Recruiting department will enter the Applicant information directly into iGreentree using *Add Applicant.*

Regardless of how data is entered, everyone in the Recruiting department should become aware of the information stored on an Applicant record and how to use it.

To manually add an Applicant in iGreentree, click *Add Applicant* from the *Applicants* menu.





Applicant Data

There is much information that can be recorded and stored for Applicants. Users may complete any or all of the fields on the base record.

Template

Templates can be used to save time during data entry and to keep data consistent when several Applicants need the same data in one or more fields, such as Source.



Filing System

This field determines how the Applicant record will be numbered and is a required field. A single Filing System, such as *Applicants* may be used or several filing systems with different numbering ranges for special groups of Applicants may also be used. For example your organization may wish to use an External and Internal Filing System, assigning a different number sequence for each.



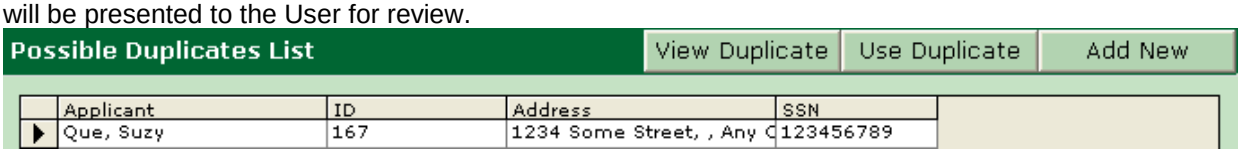
NOTE: *Filing Systems* can be created and modified from *Maintenance* | *Filing Systems*.

Saving Applicants

It is usually helpful to 

right after entering the *Name* (and *Social Security Number* if used). Upon saving, the system automatically performs a duplicate check to determine if another record exists that may be for the same Applicant. If the system finds potential duplicates it will present a list of those Applicants at the bottom of the screen.

Duplicate Applicant records are found based on the duplicate setting that is designated in *Dup Check Maintenance* (See the *Administration and Maintenance* chapter of this manual.) The possible duplicates will be presented to the User for review.



If one of the records listed seems to be a previous Application from this same person, select the possible duplicate record by clicking in the far-left column next to the name and choose one of the following options to proceed.

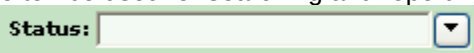
Use View Duplicate to display the possible duplicate Applicant's information next to the newly entered Applicant's information. The information can then be reviewed and compared to determine if they are one and the same. If they are the same, the information can be updated and the records merged. See the *Dup Check* section later in this chapter for more information on merging Applicants.

Use Use Duplicate when it is clear that the possible duplicate is the same person as the newly entered Applicant. This will close the Possible Duplicates List and display the selected Applicant's information on the page. The newly entered Applicant information is deleted.

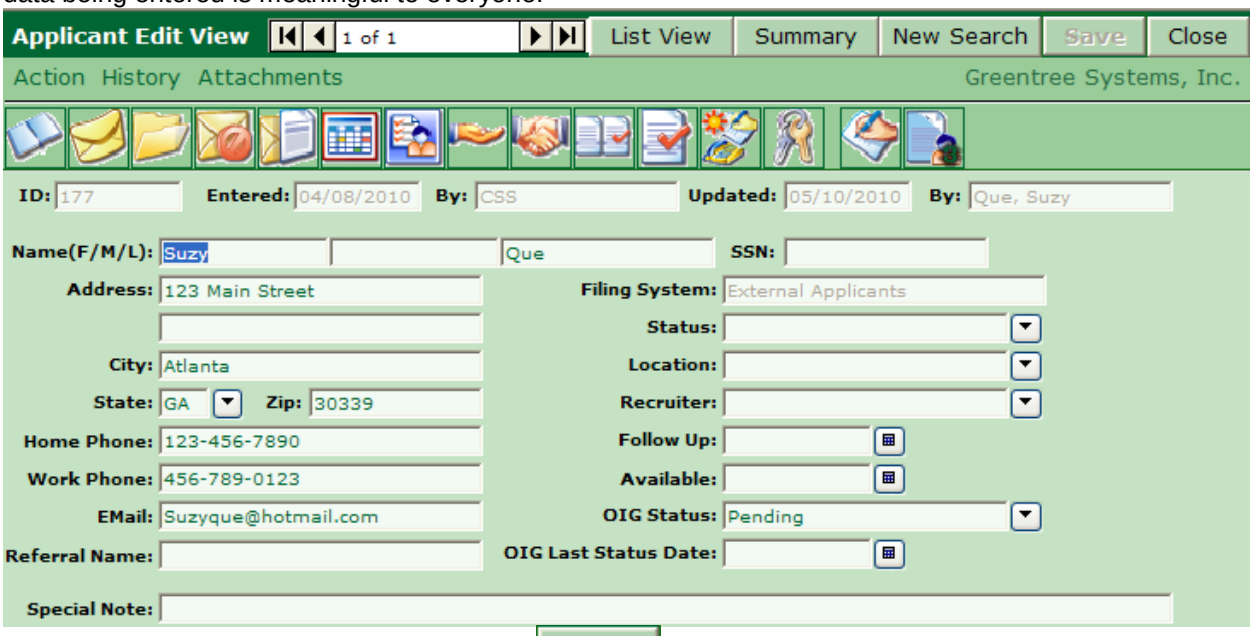
Use Add New when it is clear that the Applicants in the *Possible Duplicates List* are not a match for the newly entered Applicant. This will create a new Applicant record.

Once the Applicant is saved, an ID number is assigned, along with the date entered and name of the person who entered it. The ID number is determined by the range set for the selected Filing System. After saving, more data can be entered onto the Applicant's record.

Applicant Status
The Status field shows the status of the Applicant along the continuum of the employment process. It will often be used for searching and reporting.



Other Fields
The remainder of the Applicant fields may have been tailored to meet individual organizational needs. Enter data in each field, making sure that everyone is in agreement on how each field will be used so that data being entered is meaningful to everyone.



Enter the remaining data on this window and Save again.

Entering Additional Applicant Records

After adding an Applicant, Users can easily continue adding more records. Select the Add New button to get a blank Base Record window. Enter another Applicant Name and address and click *Save.*

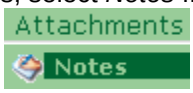
Attachment Data

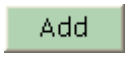
Regardless of whether initial data came from Candidate Self-Service (CSS), Resume Processing, or was manually entered into iGreentree, there are several Attachments that may need to be completed.

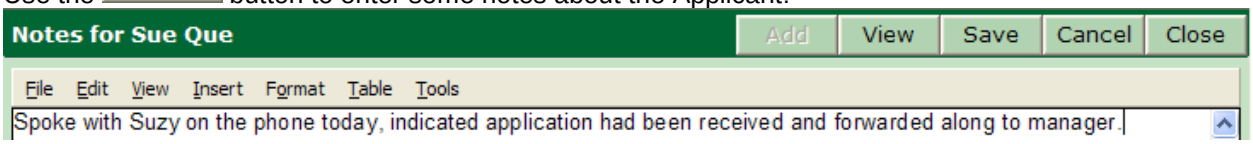


Notes

A short note can be entered in the Special Note field on the Base Record when it really needs to stand out, however most notes and other miscellaneous information about this Applicant will go in the Attachment called *Notes.*

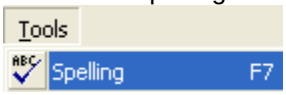
To access, select *Notes* from the *Attachments* menu or use the quick launch button  located on the toolbar. 

Use the  button to enter some notes about the Applicant:

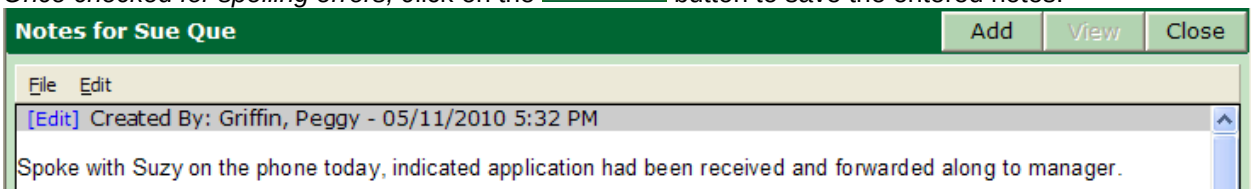

Notes for Sue Que
Add
View
Save
Cancel
Close
File Edit View Insert Format Table Tools
Spoke with Suzy on the phone today, indicated application had been received and forwarded along to manager.

The window will scroll as additional notes are entered. This information is then viewable by anyone with security access to Applicant Notes. *If notes are entered about phone calls and messages left for the Applicant, a dated, timed and signed history will be kept of the communications.*

It is recommended (although optional) that Notes *be spell checked prior to saving. Click the* Tools *menu and select* Spelling.



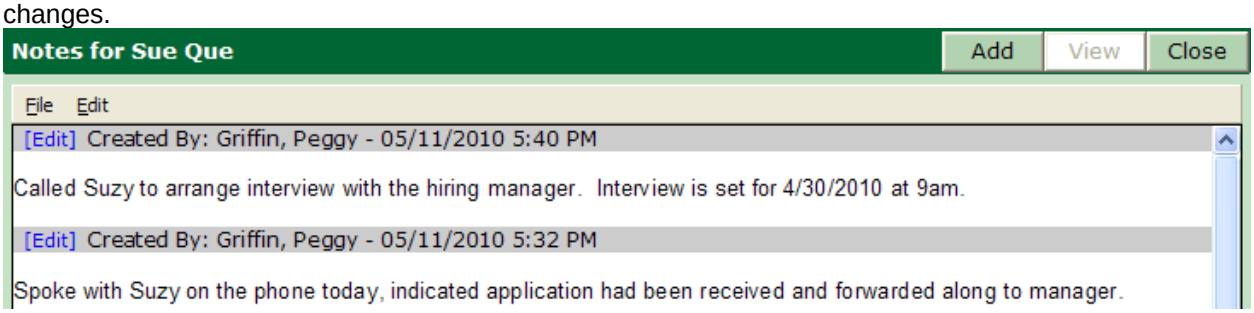
*Once checked for spelling errors, c*lick on the  button to save the entered notes.


Notes for Sue Que
Add
View
Close
File Edit
[Edit] Created By: Griffin, Peggy - 05/11/2010 5:32 PM
Spoke with Suzy on the phone today, indicated application had been received and forwarded along to manager.

The system automatically enters the name of the person who entered the note (i.e. the User's login name), the date it was entered, and the time (from the server) that it was entered.

Editing Saved Notes

If a User needs to edit an existing note, go to the *Attachments* | *Notes* menu or use the quick launch button  located on the toolbar. This brings up the list of saved notes. Click on **[Edit]** associated with the note to be modified, make the necessary changes and then click the Save button to save the changes.

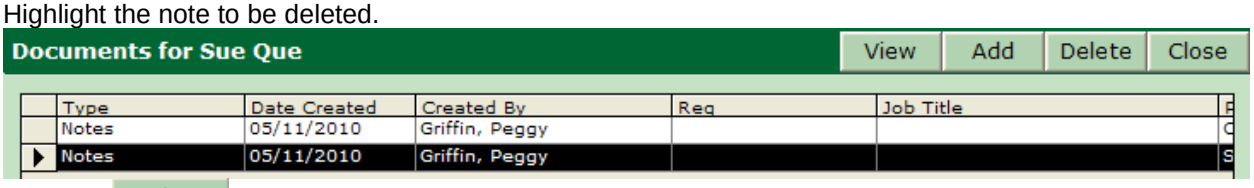

Notes for Sue Que
Add
View
Close
File
Edit
[Edit] Created By: Griffin, Peggy - 05/11/2010 5:40 PM
Called Suzy to arrange interview with the hiring manager. Interview is set for 4/30/2010 at 9am.
[Edit] Created By: Griffin, Peggy - 05/11/2010 5:32 PM
Spoke with Suzy on the phone today, indicated application had been received and forwarded along to manager.

Deleting Saved Notes

To delete an existing note, go to the *Attachments* | *Document List* menu, where each document is stored and listed separately.



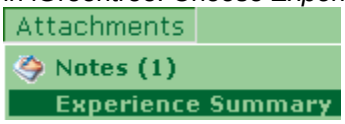
Highlight the note to be deleted.



Click the  button to delete the note. You will be asked to confirm this action. If you still want to delete the note, click OK. Otherwise, click Cancel to stop the deletion.

Experience Summary

Use *Experience Summary* to record the Applicant's previous employment history. Although experience data will populate directly from a processed resume or CSSForm, it can be viewed, edited, and added to in iGreentree. Choose *Experience Summary* from the *Attachments* menu.



Click Add to enter information about where this Applicant has previously worked. Enter a *Job Title*, employment dates, *Employer*, *Ending Salary*, and their *Reason For Leaving*. To enter dates, click over a date column and then click the ▼ button. Select the appropriate month and year and then click any day within that month. The *Experience Summary* will only display the month and year.

	Job Title	From	To	Employer	Ending Salary	Reason For Leaving
▶	Account Manager	03/2004	07/2005	Greentree System	$2.00	Relocation
	Recruitment Specialist	12/2001	02/2004	Fairview Health Se	$2.00	Marriage

Use the Add button again to enter another previous employer.

An employment item that has been determined to be inaccurate can be removed by highlighting the appropriate row and clicking Delete.

Click Save when finished entering/updating the employment information.

Education Summary

Use *Education Summary* to record the Applicant's educational background. Although education data will often come directly from a resume or CSSForm, it can be viewed, edited, and added to in iGreentree.

Choose *Education Summary* from the *Attachments* menu.



Click Add to enter information about education. Enter the name of the school, degree received, major, and dates attended. The name and major fields can be typed directly into the fields.

To enter the degree, click in the degree column and then click the ▼ button. Select the appropriate degree and click OK.

To enter dates, click in a date column and then choose the ▼ button. Select the appropriate month and year and then click any day within that month. The *Education Summary* will only display the month and year.

	School	Degree	Major	From	To
▶	University of Some State	Bachelors	Being Perfect	09/1998	05/2002

Use the Add button again to enter additional education data.

An educational item that has been determined to be inaccurate can be removed by highlighting the appropriate row and clicking Delete.

Click Save when finished entering/updating the education information.

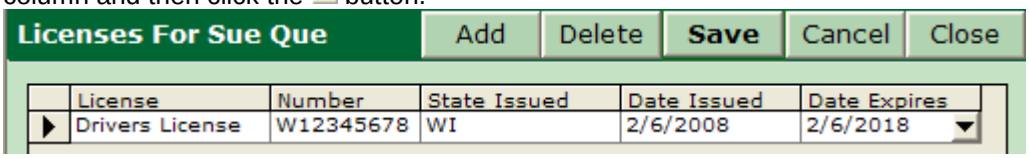
Licenses & Certificates

Use *Licenses & Certificates* to record relevant licenses and certifications for Applicants. Although license and certification data will often come directly from CSS, it can be viewed, edited, and added to in iGreentree.

Choose *Licenses & Certificates* from the *Attachments* menu.



Click Add to enter information about licenses and certifications. Enter the name of the license, the *Number*, the *State Issued*, *Date Issued*, and the *Date Expires*. To enter dates, click over a date column and then click the ▼ button.



Use the Add button again to enter additional license or certification data.

A license or certification that has been determined to be inaccurate can be removed by highlighting the appropriate row and clicking Delete.

Click **Save** when finished entering/updating the *Licenses & Certificates* information.

Resume Text/Resume Image

If an Applicant pastes a copy of their resume into their Application from the CSS Site a copy of the most recently submitted version will appear in Resume Text. Also, if using the ScanStation or Resume Processor Module, *Resume Text* and/or *Resume Image* files will be entered into the system automatically by email. The resumes can be viewed from the Applicant's *Attachments* menu. See the *Resume Processor and ScanStation Chapter of this manual for more information about these* Attachments.

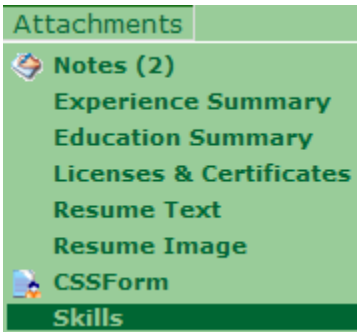
CSSForm

If using Candidate Self-Service (CSS), the CSSForm will be entered into the system automatically by CSS. See the *Candidate Self-Service Chapter of this manual for more information about the* CSSForm Attachment.

Skills

Use *Skills* to record information about the Applicant's skill set. Although skills will often come directly from a resume or CSSForm, they can be viewed, edited and added to in iGreentree.

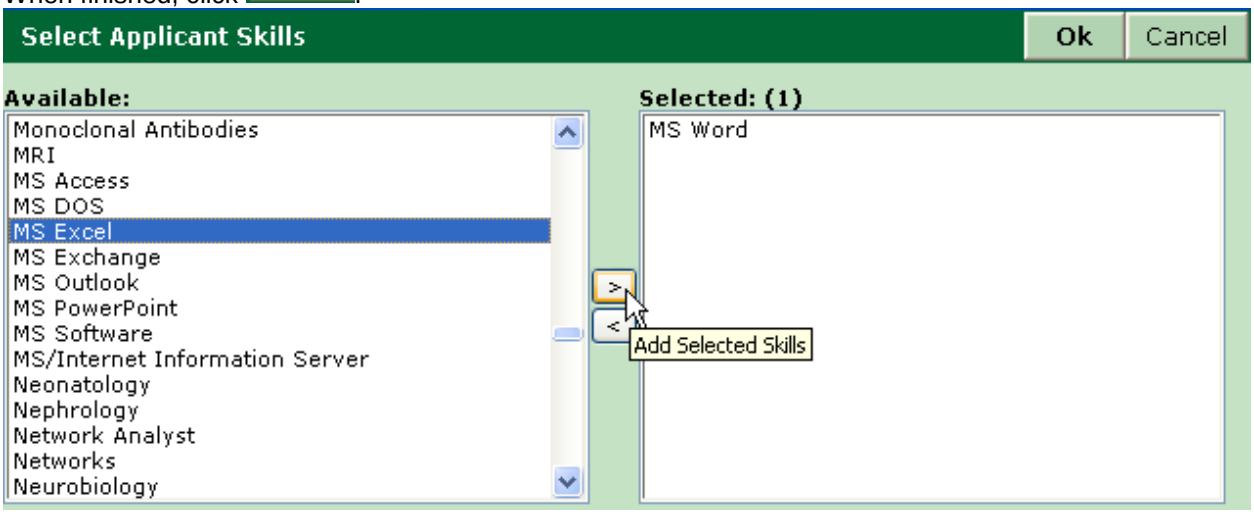
Choose *Skills* from the *Attachments* menu.



To add a new skill for the Applicant click Add. Scroll down using the vertical scroll bar and use the > button to move the skill to the *Selected* column. Repeat until all desired skills are under the *Selected* column.

To remove a skill from the *Selected* column, highlight the skill then click on the < button to move it to the *Available* column.

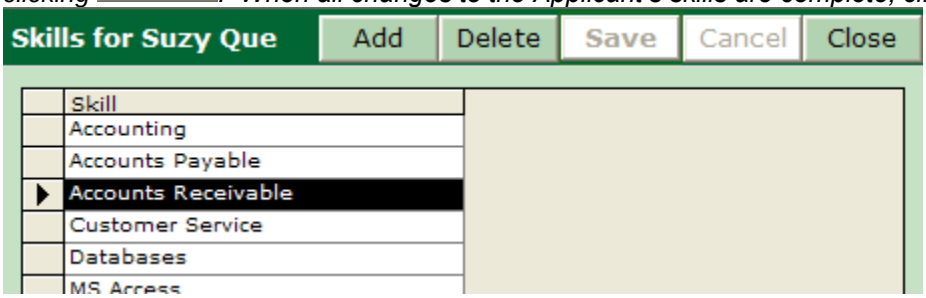
When finished, click Ok.



Click Save when finished entering or removing new skills.

There is no limit to the number of skills that can be entered on an Applicant's record. A skill will only appear once in an Applicant's Skill *Attachment even if the Applicant submits multiple resumes or CSSForms containing that skill.*

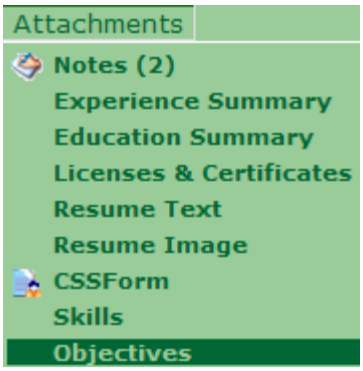
A skill that has been determined to be inaccurate can be removed by highlighting the appropriate skill and clicking Delete. *When all changes to the Applicant's skills are complete, click* Save.



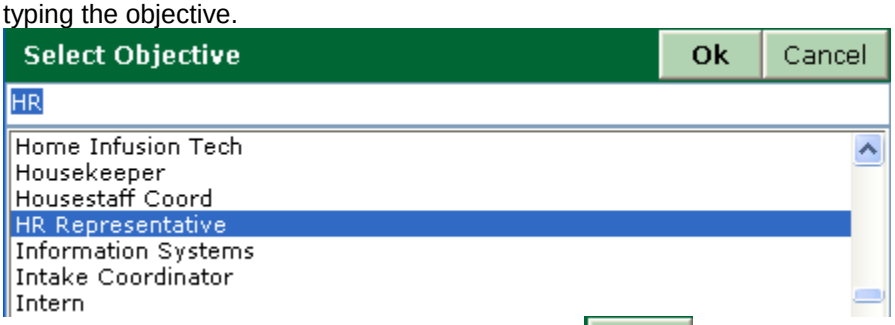
Objectives

Use *Objectives* to record the type of job(s) that the Applicant has expressed interest in. Although objectives may come directly from a resume, they can be viewed, edited, and added to in iGreentree. *Objectives* can be particularly useful when searching for Applicants with skill sets that may fit various positions.

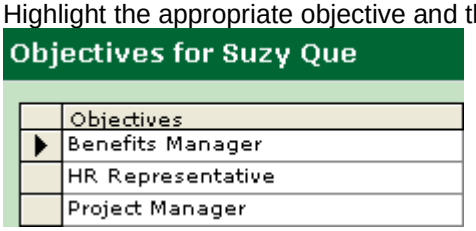
Choose *Objectives* from the *Attachments* menu.



Click Add to choose from the available *Objectives*. Scroll down using the vertical scroll bar or start typing the objective.



Highlight the appropriate objective and then click Ok to add the objective.



An Objective *that has been determined to be inaccurate can be removed by highlighting the appropriate line and clicking* Delete.

Click Save when finished entering/updating *Objectives.*

Warning:

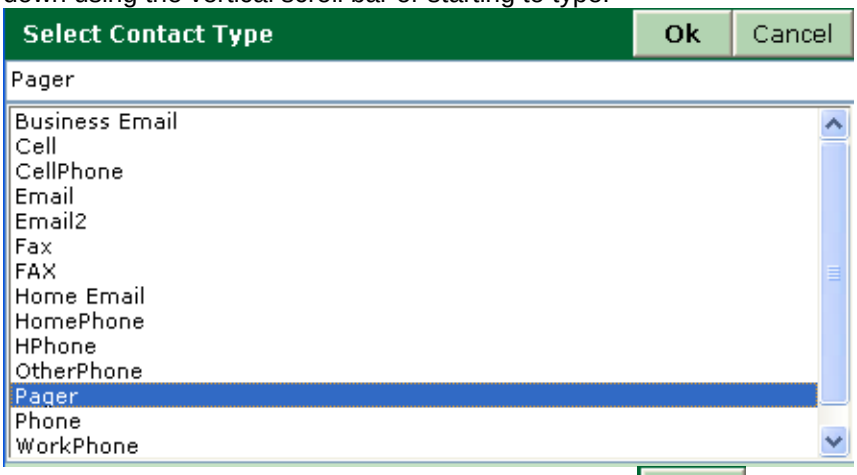
1. Objective codes should be very general, such as Accountant, rather then the specific like Accountant II, Sr. Cost Accountant, etc. Objective data comes from the Objective or Career Goal section of an Applicant's resume, which usually does not indicate a specific level of position.
2. Do not forget to also log the Applicant to the Req if the individual is actually a candidate. (See the Applicant Processing chapter)

Contact Info

Additional phone numbers, pager numbers, email addresses, and temporary addresses can be recorded for Applicants. Although contact information will often come directly from a resume or through CSS it can be viewed, edited and added to in iGreentree. Choose *Contact Info* from the *Attachments* menu.

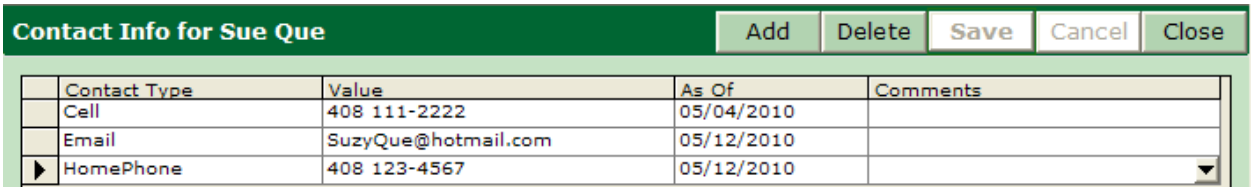


Click the Add button to enter additional contact information. Choose a *Contact Type* by scrolling down using the vertical scroll bar or starting to type.



Highlight the appropriate *Contact Type* and then click Ok to add the additional contact information.

Enter the Value (i.e. number or address) of this contact method. The *As Of* date will automatically be entered with today's date. This date may be overwritten if appropriate. Click Save to save the new contact record.



Once the new contact has been saved, a comment can be added to it by clicking in the *Comment* field. When the appears, click on it to bring up a new window. Click Add to enter the comment then Save to save it.

There are three special contact types: *HomePhone, WorkPhone,* and *Email.* These fields can be entered either from the Applicant window or from the *Contact Info Attachment.* Either entry point will update on the other window the next time it is opened. In the event a second email address is added (*Email2*), *Email* is used as the default when a letter is sent. QuickSearches can also be performed on these 3 special contact types.

Click Save when finished entering/updating all the contact information.

EEO

EEO information can be recorded for Applicants. Reports can be generated on this information using iGreentree standard reports or other custom reports. Although EEO information may be entered through CSSForm, it can be viewed, edited, and added to in iGreentree.

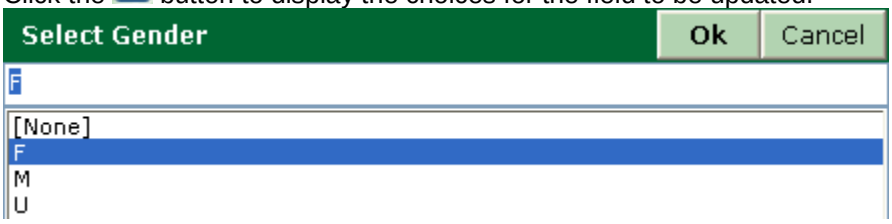
Choose *EEO* from the *Attachments* menu, and enter the appropriate EEO codes.



Here you can record information about the Applicant's *Gender*, *Disabled* and *Veteran* statuses, *Race, Ethnicity* and their *Date of Birth*.



Click the button to display the choices for the field to be updated.



Highlight the appropriate *EEO* information from the list and click Ok.

Click Save when finished entering/updating the relevant EEO fields.

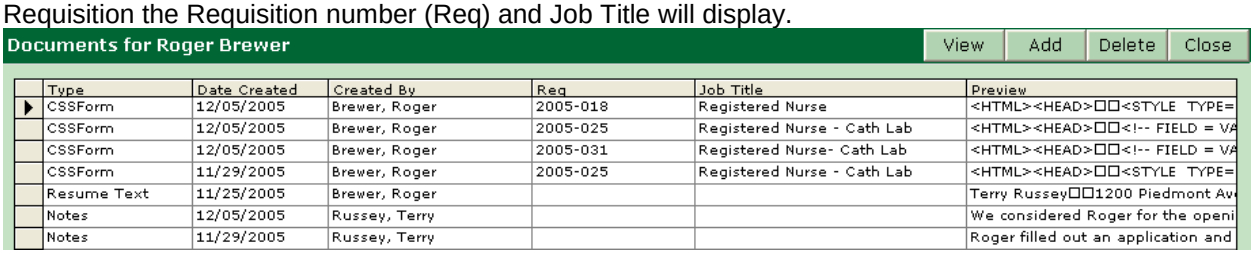
Document List

Many different types of documents can be stored for Applicants. Many of these documents will come directly from the Resume Processor or CSS. Existing documents can be viewed and added to in iGreentree.

To view the documents that are available for an Applicant go to the *Attachments* menu and select *Document List*.



All available documents will be displayed along with information about when the document was added (*Date Created*) and who added it (*Created By*). In addition, if the document was added for a specific Requisition the Requisition number (Req) and Job Title will display.


Documents for Roger Brewer
View
Add
Delete
Close
Type | Date Created | Created By | Req | Job Title | Preview
CSSForm | 12/05/2005 | Brewer, Roger | 2005-018 | Registered Nurse | <HTML><HEAD>□□<STYLE TYPE=
CSSForm | 12/05/2005 | Brewer, Roger | 2005-025 | Registered Nurse - Cath Lab | <HTML><HEAD>□□<!-- FIELD = VA
CSSForm | 12/05/2005 | Brewer, Roger | 2005-031 | Registered Nurse- Cath Lab | <HTML><HEAD>□□<!-- FIELD = VA
CSSForm | 11/29/2005 | Brewer, Roger | 2005-025 | Registered Nurse - Cath Lab | <HTML><HEAD>□□<STYLE TYPE=
Resume Text | 11/25/2005 | Brewer, Roger | | | Terry Russey□□1200 Piedmont Av
Notes | 12/05/2005 | Russey, Terry | | | We considered Roger for the openi
Notes | 11/29/2005 | Russey, Terry | | | Roger filled out an application and

If the Applicant actually applied, he/she will have a *CSSForm* which is a HTML file that contains the Application (minus the Voluntary Survey). The Applicant may also have a *CSSNote* which would exist if the Applicant tried to apply for a job they previously applied for.

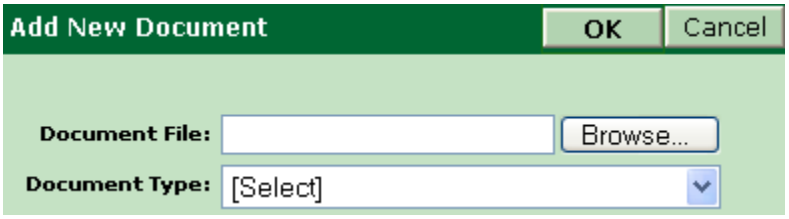
NOTE: If an Applicant has a document type listed as *CSSFormInterim* the submitted CSS Applications are not processing completely. Applications are only viewable as *CSSFormInterim* as it is processing into a *CSSForm* (very short time). Contact your iGreentree Administrator or Greentree Technical Support if your CSSForms are not fully processing.

To view an existing document, select the document row and click the 

button.

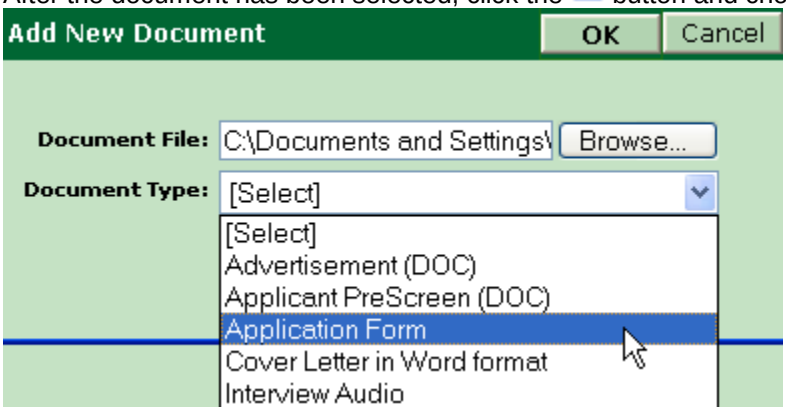
To add a document to the Applicant's *Document List*, click 

to get to display the *Add New Document* window.

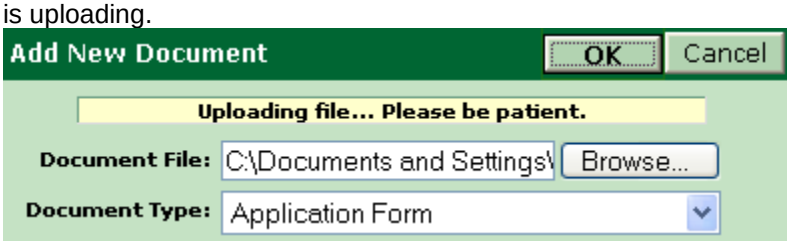


Choose Browse... to navigate to where the document to be added has been saved on your computer. Navigate by clicking the folders until you reach the destination where the document is stored and then double click the document to add it to the *Document File* field.

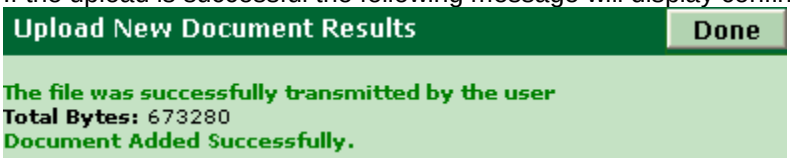
After the document has been selected, click the button and choose the *Document Type* from the list.



Click Ok to add the document type. The *Add New Document* window will reflect that the document is uploading.



If the upload is successful the following message will display confirming the success.



The document will be added to the *Document List* after clicking Done.

To add another document to the Applicant's record, click Add again and repeat the steps.

To delete an existing document, select the document row and click the Delete button.

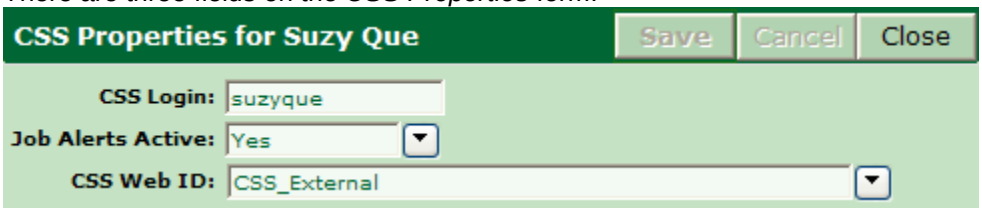
CSS Properties

If using Candidate Self-Service (CSS), information about the Applicant's *CSS* Login, Password, Job Alerts activation and CSS web entry will all be recorded in the *CSS Properties Attachment.*

To review the Applicant's CSS information, go to the *Attachments* menu and select *CSS Properties*.



There are three fields on the *CSS Properties* form.



CSS Login: The Applicant's *CSS Login* is the UserID that he/she created in CSS. It displays and can be edited by clicking in the field and typing over the existing *CSS Login*.

Job Alerts Active: The *Job Alerts Active* field displays whether or not the Applicant has set up a Job Alert in CSS to notify them when positions are posted that match the Applicant's Job Alert criteria. The User can turn off the Applicant's Job Alert by clicking the button and changing the field to "No".

CSS Web ID: This field indicates which CSS Web the Applicant most recently applied thru when an organization has more than one CSS site (i.e. Internal and External site).

Click Save when finished entering/updating the relevant *CSS Properties* fields.

Applicant Activity

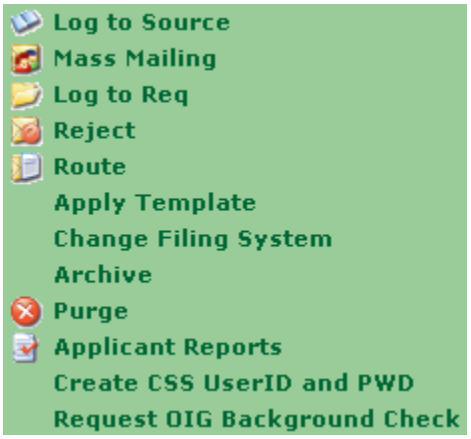
iGreentree has *Actions* that assist the User during the employment process. *Actions* will update data and automatically record *History* while providing the option to generate any necessary output such as letters and/or reports.

The Applicant *Action* menu can be used to change data, send letters, and perform other actions for Applicants. If the User is in Edit View or Summary, only the selected Applicant will be affected by the Action. If the User is in List View, all of the records that are currently displayed will be affected by the Action, regardless of whether any record is highlighted or not. Users have the option to remove one or more records from the list before performing the Action, which will affect only the remaining records.

Single Actions:



Mass Actions:



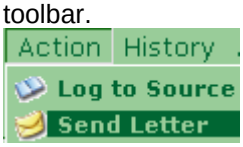
Log to Source/Sources

The *Log to Source* Action can be used to manually record where an Applicant heard about an opening. If CSS is used this information may be collected as an answer to a Global Question. A History of where the Applicant came from can be viewed in *Sources* History. More information about *Log to Source* and *Sources* can be found in the Sources and Expenses chapter of this manual.

Send Letter

Users can send letters to Applicants for a variety of reasons, including acknowledging receipt of their Application or resume, regrets, details for an interview, offer letters, hire confirmations, etc. These letters may be printed to paper or sent via email.

To begin, select *Send Letter* from the *Action* menu or click on the quick launch button  located on the toolbar.

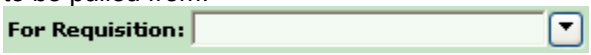




A *Status* can be entered for the Applicant. It is important to remember that the Applicant's *Status* is used to represent the candidate's status overall with an organization NOT their status for a particular job opening.

Optionally, a *Follow-up* date can be entered. This field is not needed to perform the action, but may be convenient for updating the Applicant *Follow-up* field. 

Selecting the Requisition for which the Applicant is being considered can be very useful. If data from the Requisition is to be inserted into the letter being sent it will be necessary to choose which Requisition it is to be pulled from.

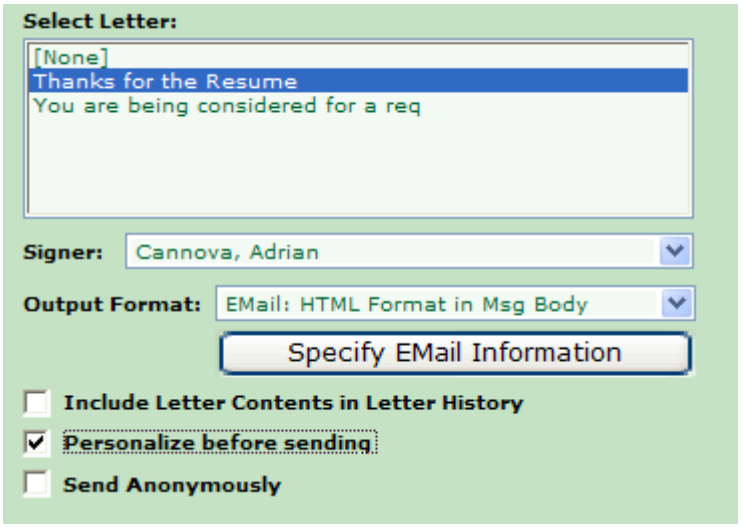


If a new Status or Follow-up date is entered, it will update the Applicant Base Record after the action is performed.

A letter can be selected. For this example, the *Thanks for the Resume* letter was chosen.

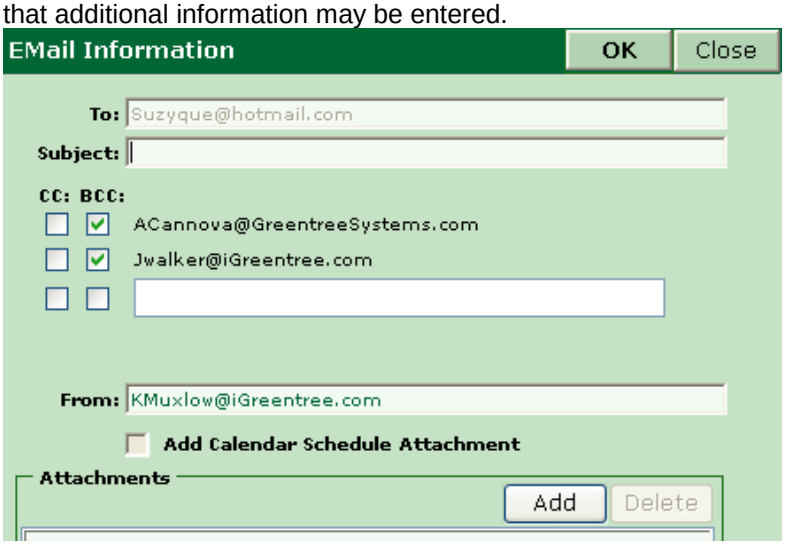
Signer determines whose signature, name, and title will be on this letter if the letter is using the signer fields as letter inserts.

Output Format determines how the letter will be sent. There will always be two print options available. If an email address is available for the Applicant additional emailing options will also be available.

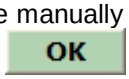


If sending the letter via email, the 

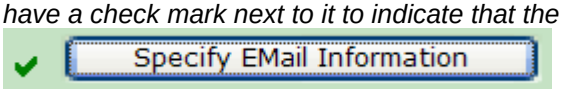
button becomes available so that additional information may be entered.



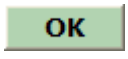
The email address populates automatically in the *To:* field from the email field on the Applicant's record. A *Subject* must be entered here. The Recruiter and Hiring Manager listed on the chosen Requisition are listed to be copied by default. Other recipients can be manually designated in the blank field.

Attachments can also be added if needed. Choosing 

will save the email information. The User is then returned to the Send Letter action dialog box. *The Specify Email Information button will now have a check mark next to it to indicate that the User has already entered the email information.*



NOTE*: If the Applicant chosen does not have anything in the Email field, the User will not have the email choice available as an Output Format. The letter must be printed.*

Select 

to run the Action.

Including Letter Contents in Letter History

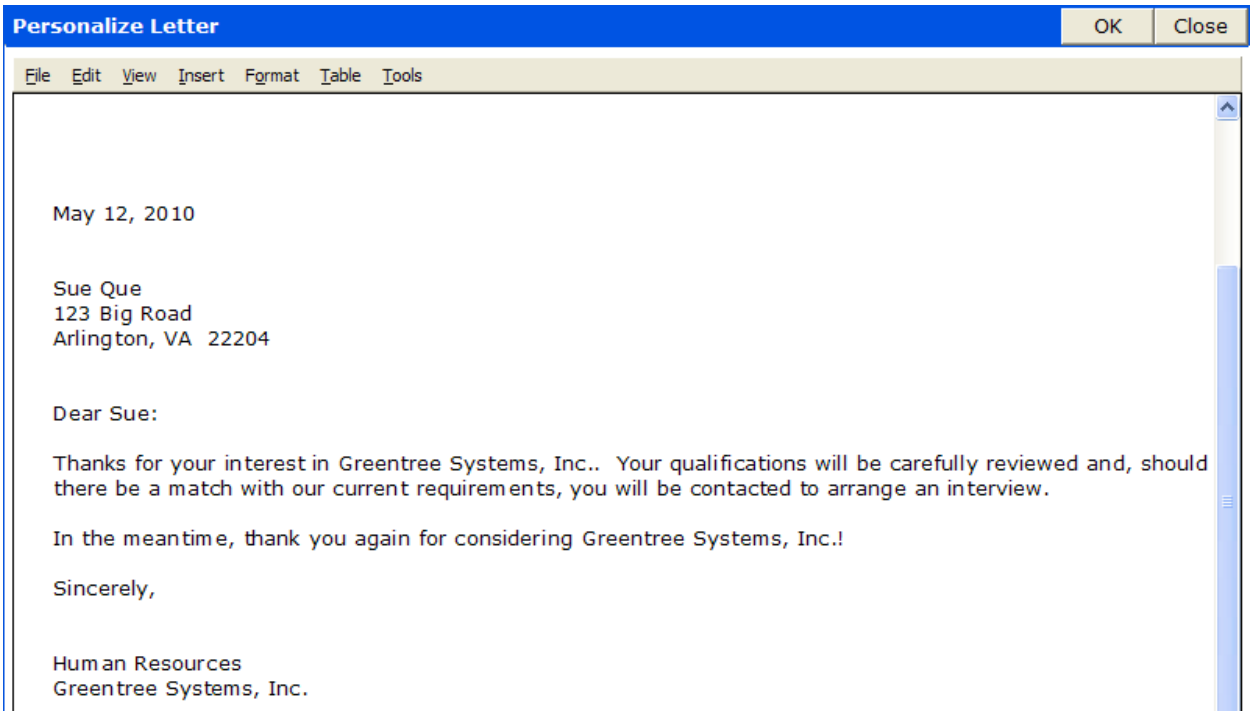


If the Include Letter Contents in Letter History option was selected then the body of the letter is saved in Letter History. The contents can be viewed or edited from History | Letters. If the box is not selected, then the letter history contains only that the letter was sent, not its contents. Greentree recommends that letter contents be saved for important letters such as Offer Letters.

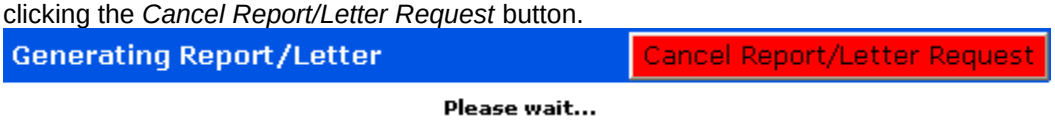
Personalizing Before Sending



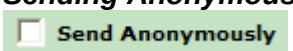
If the *Personalize before sending* option was selected, the letter will appear in edit mode, with this Applicant's name, address, and other data inserted.


Personalize Letter
OK
Close
File Edit View Insert Format Table Tools
May 12, 2010
Sue Que
123 Big Road
Arlington, VA 22204
Dear Sue:
Thanks for your interest in Greentree Systems, Inc.. Your qualifications will be carefully reviewed and, should there be a match with our current requirements, you will be contacted to arrange an interview.
In the meantime, thank you again for considering Greentree Systems, Inc.!
Sincerely,
Human Resources
Greentree Systems, Inc.

If necessary, the User can *Edit* the letter's content and/or formatting. *File/Print can be used to print a copy of the letter.* When the letter is ready to be sent, the User chooses OK to send it via the selected output format. A processing box will display while the letter is being generated. The User can cancel by clicking the *Cancel Report/Letter Request* button.



Sending Anonymously



If the Send Anonymously option was selected, the letter will be sent using the System Email From Address rather than the logged User's email address. This email address is defined in *Maintenance* | *System Settings* | *System Email From Address*.

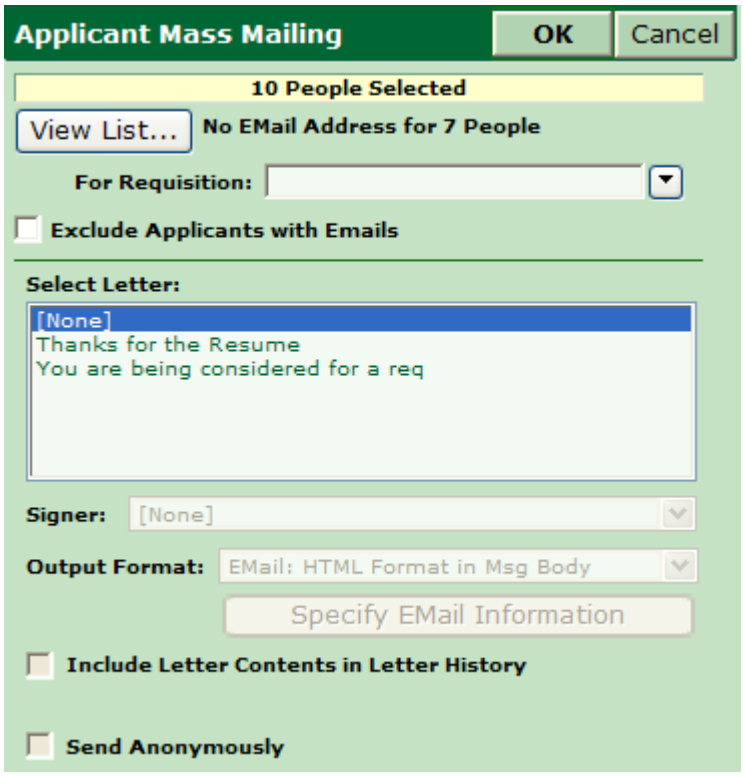
If Email had not been chosen as the Send By option, the system would now open a Word Processing Application (the Application which your computer associates with the output format selected), where the letter could be saved to a new file or Printed.

Mass Mailing

Letters can also be sent to a group of Applicants from the *List View*. It is important to remember that the letter will be sent to ALL the Applicants who are in the List regardless of whether or not one is selected.

Select *Mass Mailing* from the *Action* menu or click on the quick launch button  located on the toolbar.





The system checks for the presence of an email address to assist Users who want to send these letters via email. If any Applicants are found in the List missing email addresses, it will provide a warning. Users can use the *View List* button to see which Applicants will not get emailed letters. The Action may be run a second time, this time checking *Exclude Applicants with* Emails and choosing an Output Format of printable nature.

Choose  to run the action and have the letters be generated and/or sent. There is no personalizing option for *Mass Mailing*.

Letters History

Letters that have been sent will automatically be added to *Letter History* for this Applicant. To view the *Letter History* select *Letters* from the History menu.



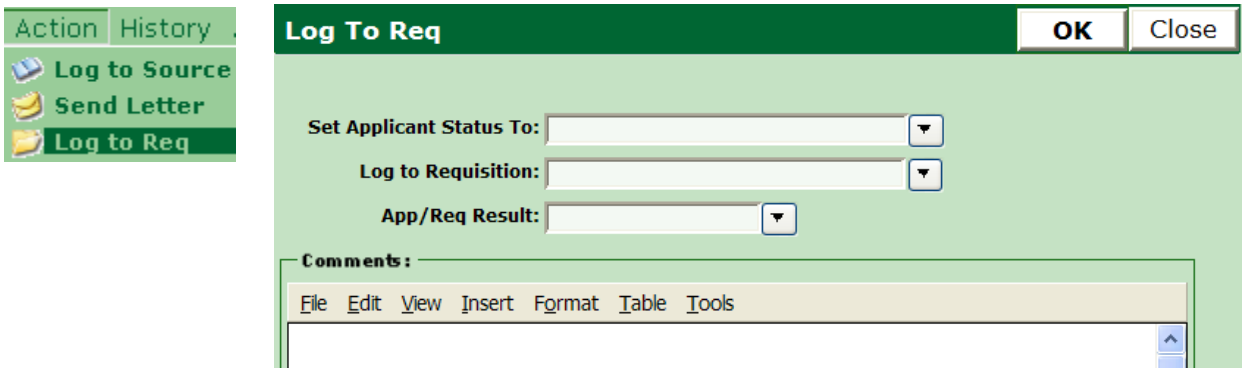
Information including the sender, the date sent, how it was sent and the name of the letter are available for review. If *Include Letter Contents in Letter History* was selected when the *Send Letter* action was generated, the View button will be available. This will allow Users to review the letter text and/or reprint it.

	Letter Date	Sent Via	Signer	Sent By	Letter Name	Letter Status
	11/28/2005	EMail: HTML Form		Weber, Carole	CSS Application Received	Sent
	12/05/2005	EMail: HTML Form	Mercer, Michael M	Russey, Terry	Hire Confirmation	Sent
	12/09/2005	EMail: HTML Form		CSS,	CSS Thanks for Registering	Sent
	12/09/2005	EMail: HTML Form		Weber, Carole	CSS Application Received	Sent
	12/03/2005	EMail: HTML Form	Cannova, Adrian	Russey, Terry	You are being considered for a	Failed
	12/03/2005	EMail: HTML Form		Russey, Terry	You are being considered for a	Sent
▶	01/25/2006	EMail: HTML Form	Mercer, Michael M	Russey, Terry	Hire Confirmation	Sent

Log to Req

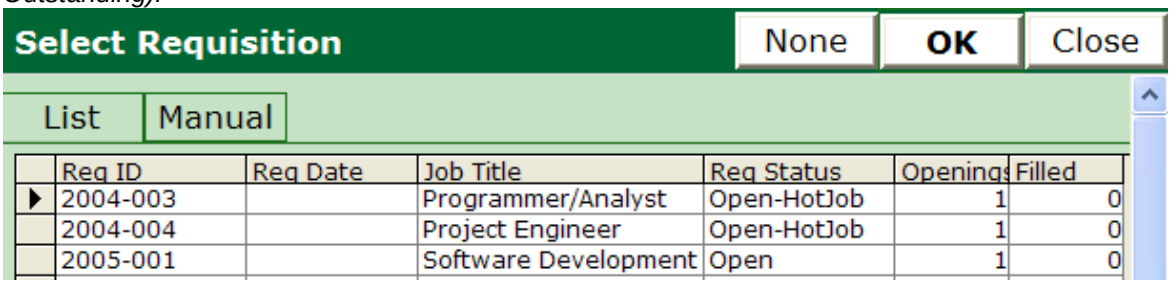
The Log to Req action connects a person to a Requisition. You may log a group of Applicants at once to a Requisition, or if preferred you can log singularly log each Applicant.

Select *Log to Req* from the *Action* menu or click on the quick launch button  located on the toolbar.



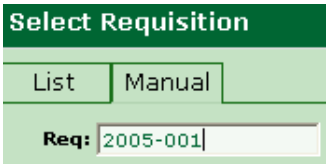
The Applicant's overall Status is often left blank, but if completed it will update the Applicant's base record. The important part of this action is choosing the Requisition.

Click the  button next to *Log to Requisition* to be presented with a list of the available Requisitions. (The list of Reqs will typically be set up to include any Reqs that currently have a Status of *Open* or *Offer Outstanding).*



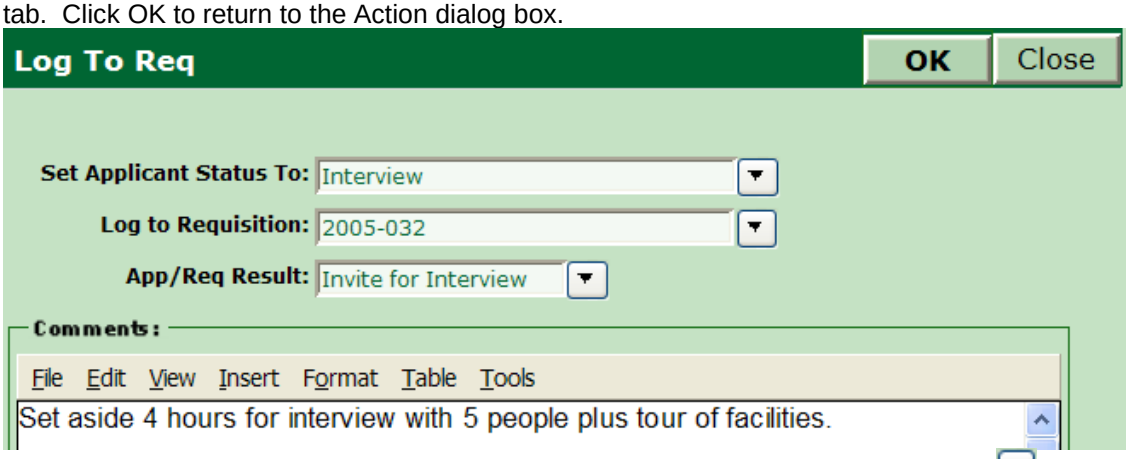
Applicants who apply via CSS will automatically be logged to the Req(s) they select. Any Reqs this Applicant had previously been logged to would already have a date in the Req Date column.

If a Requisition is needed that is not on the list, or if the User knows the Req Number, they can select the *Manual* tab at the top and type in a Req number.



There is also an option to use the View All Reqs button. BE CAREFUL!! This option will pull up every Requisition in the database and depending on how many, may take a long time to generate.

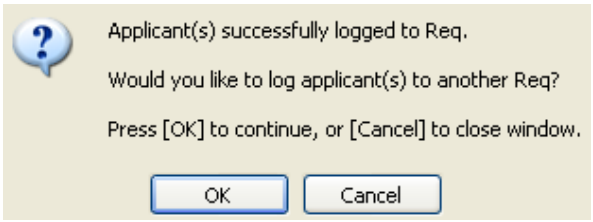
Select a Requisition by clicking the box in the far left-hand column or by manually typing in the Manual tab. Click OK to return to the Action dialog box.


Log To Req
OK
Close
Set Applicant Status To: Interview
Log to Requisition: 2005-032
App/Req Result: Invite for Interview
Comments:
File Edit View Insert Format Table Tools
Set aside 4 hours for interview with 5 people plus tour of facilities.

You can also set the Applicants *App/Req Result* from this Action screen. Select the button to view a list of available *App/Req Results*, select the appropriate value and click OK to return to the Action screen.

Comments may be entered in this screen and are stored in Requisition History. (Described later in this Chapter).

To run the Action click OK.

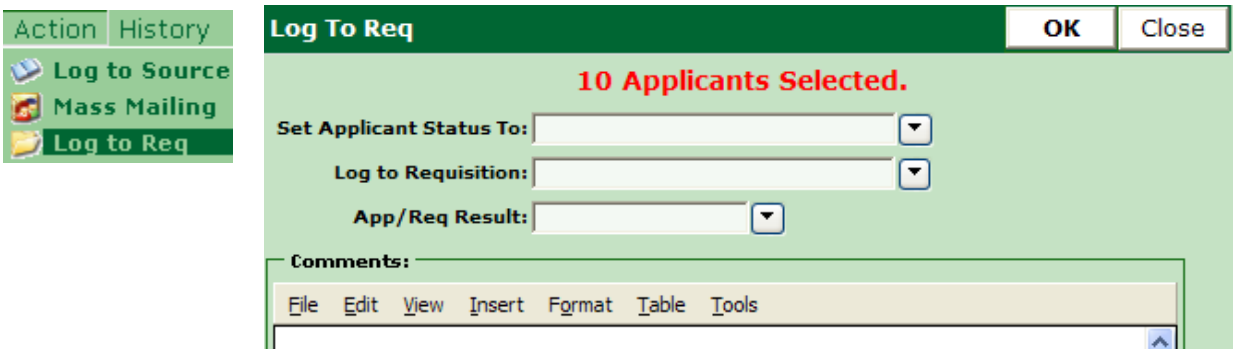

Applicant(s) successfully logged to Req.
Would you like to log applicant(s) to another Req?
Press [OK] to continue, or [Cancel] to close window.
OK
Cancel

You may log the Applicant to an additional Requisition by clicking OK, and you will be returned to the main *Log to Requisition* screen. Or if complete, click Cancel to return to the Applicant Screen.

Mass Log to Req

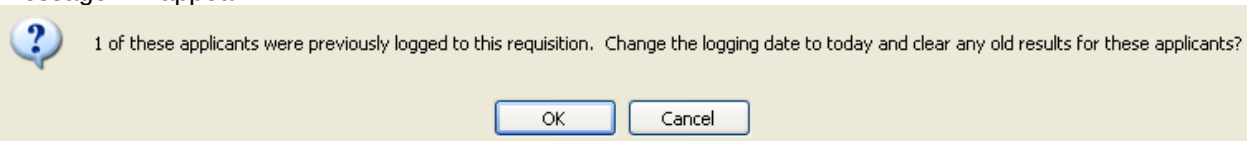
A group of Applicants can all be logged to the same Req in one step using the *Log to Req* mass Action from the List View. This might be useful when a group of Applicants is logged to a Requisition that is filled and now they will all be considered for a new Requisition with the same title and qualification requirement. It is important to remember that ALL the Applicants who are in the List, regardless of whether or not one is selected, will be logged to the Requisition selected.

Select *Log to Req* from the Action menu or click on the quick launch button located on the toolbar.



The Action is the same as described above for the Single Log to Req, with the exception of displaying how many Applicants will be logged to this Requisition in red at the top.

If any of the Applicants in the list were previously logged to the selected Requisition, the following message will appear.


1 of these applicants were previously logged to this requisition. Change the logging date to today and clear any old results for these applicants?
OK
Cancel

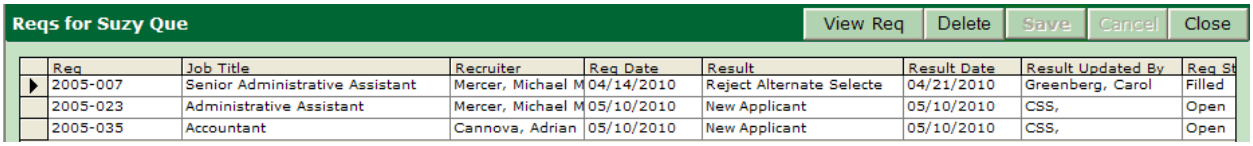
Select Cancel if previous App/Req data should not be updated for those Applicants who were already candidates for this Req. You will need to go back to the list of Applicants and remove the individual(s) before running the action again. Select OK to clear the previous data and overwrite with the new data.

Reqs Applied For History

The Requisitions an Applicant is logged to are recorded in the *Reqs Applied For* History for that Applicant. Select *Reqs Applied For* from the History menu.



The User can view a list of all Requisitions that the Applicant has applied for, including identifying information as well as dates and results.



Req	Job Title	Recruiter	Req Date	Result	Result Date	Result Updated By	Req St
2005-007	Senior Administrative Assistant	Mercer, Michael M	04/14/2010	Reject Alternate Selecte	04/21/2010	Greenberg, Carol	Filled
2005-023	Administrative Assistant	Mercer, Michael M	05/10/2010	New Applicant	05/10/2010	CSS,	Open
2005-035	Accountant	Cannova, Adrian	05/10/2010	New Applicant	05/10/2010	CSS,	Open

From this History, Users can review the entire Requisition by choosing 

. An additional browser window will open showing the Requisition in Edit View.

Reject

The Reject Action will update both the Status and Result fields while allowing a customized turn down letter to be generated and sent to the Applicant.

There are several scenarios that this Action can be used to support:

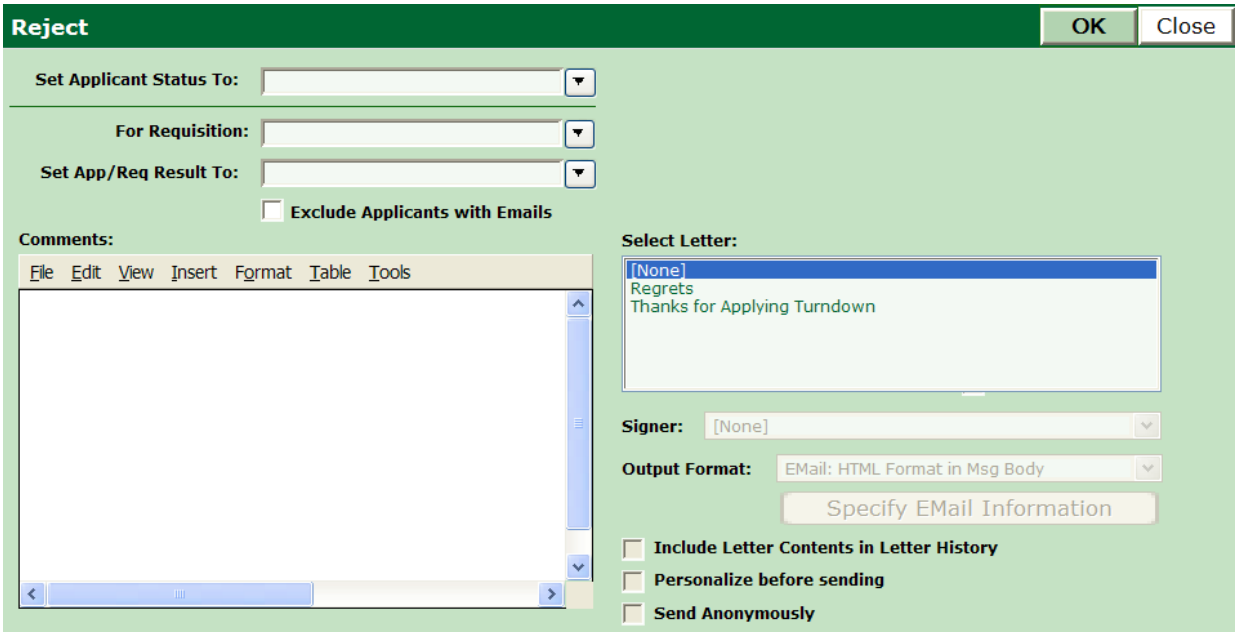
1) If the Applicant is not a fit for a particular Requisition, but may be considered for future openings, reject him/her for the Requisition, but not overall. Enter a Status of *Future,* select the Requisition he/she is being turned down for, and select the Set App/Req Result To that appropriately identifies the reason he/she is being rejected for that position.

2) If the Applicant is not a fit for the organization, reject him/her overall. Enter a Status of Excluded *and leave the* For Requisition *and* Set App/Req Result To *fields blank.*

3) If the Applicant is not a fit for a position nor overall, reject him/her for the particular Requisition and overall. Enter a Status of Excluded, select the Requisition he/she is being turned down for, and select the Set App/Req Result To that appropriately identifies the reason he/she is being rejected for that position.

To use, select *Reject* from the Action menu or click on the quick launch button  located on the toolbar.





The action can be used simply to update the Applicant and Requisition records, or, regardless of the scenario, the User can concurrently send a custom regret letter. If the User would like to send a letter, the action functions the same as Send Letter*, described above.*

Choose 

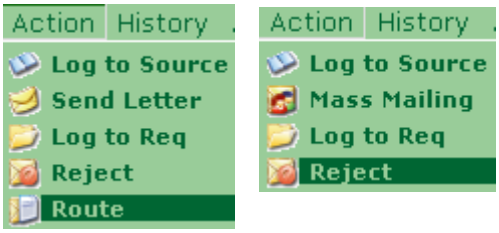
to run the action with the desired selections.

The letter information will be stored in Letters *History. T*he Result code is also added to both the *Reqs Applied For* History for this Applicant and to the *Applicant* History for the selected Requisition.

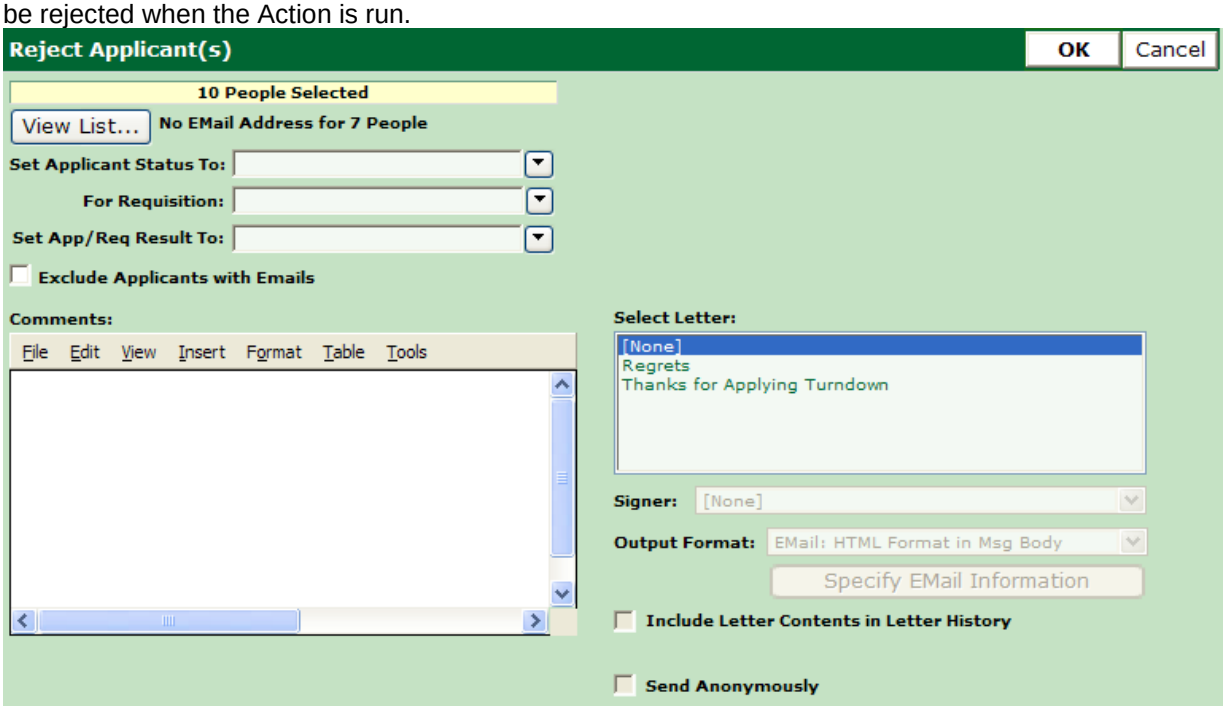
Mass Reject

A group of Applicants can all be rejected in one step using the *Reject* Action while in List View. This might be useful when a group of Applicants is logged to a Requisition that is filled and a custom turn down letter needs to be sent to all the non-selected Applicants.

To run, select *Reject* from the Action menu or click on the quick launch button  located on the toolbar.

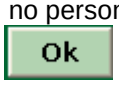


The Action will provide a count of how many Applicants the Action is going to impact. It is important to remember that ALL the Applicants who are in the List, regardless of whether or not one is selected, will be rejected when the Action is run.



The *Applicant Status* and *App/Req Result* selected will overwrite any existing *Status* or *Result* (for the specified Requisition) that the Applicants may already have. If an Applicant in the list is not logged to the selected Requisition this Action will log them to it.

There is no personalizing letter option for *Mass Reject.*

Choose 

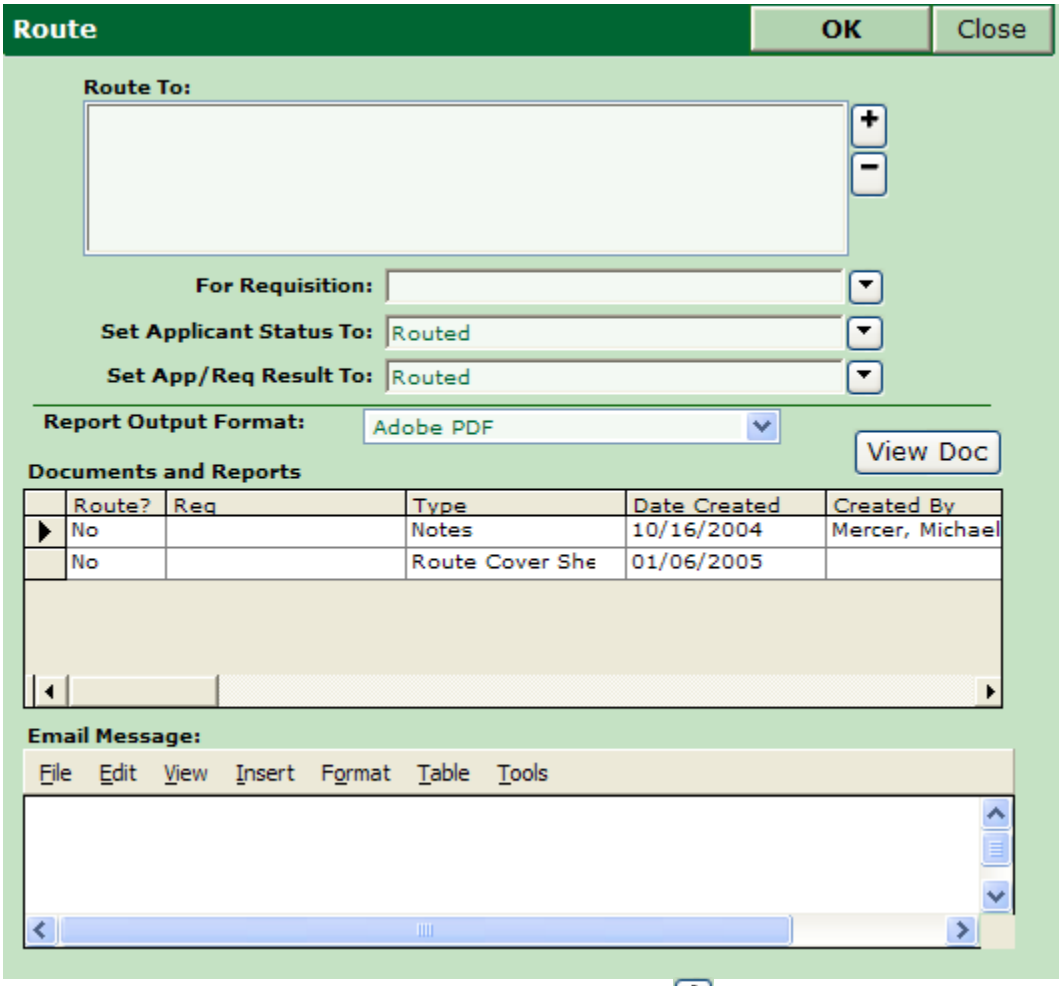
to run the action and have the selected letter be generated or emailed to the Applicants.

Route

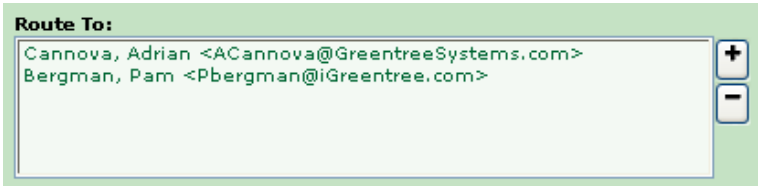
Use the Route action to send Applicant information and/or documents to others, to record what type of information was sent, and to record the results of the routing. Even if nothing needs to be physically sent from iGreentree, the User may use this action to record what was sent manually.

Select *Route* from the Action menu or click on the quick launch button  located on the toolbar.

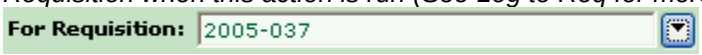
The Route Action is used to send Applicant information to others. It will also keep record when and to whom the information was sent.



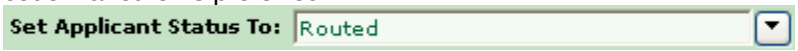
Select one or more people to Route to by clicking on the + button. *The list of names available for Routing includes Hiring Managers and Recruiters.* If a selection is made incorrectly, use the − button to remove someone from the route list.



If a Requisition is chosen that the Applicant is not already logged to, they will be logged to that Requisition when this action is run (See Log to Req for more information). Choosing a Req is optional.



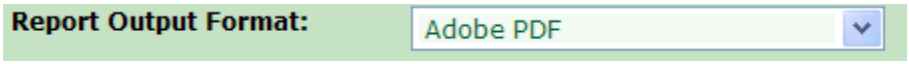
The Applicant Status is set to default to *Routed.* The User can change this to a different Applicant Status code if another is preferred.



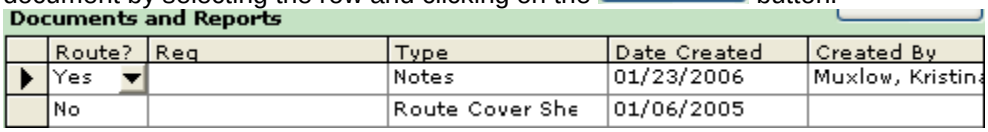
The Applicant's Result for this position is set to default to *Routed*. The User can change this to a different Result code if another is preferred.



The *Report Output Format* controls the output type for any Route Reports that might be included in what is being sent to the hiring manager. Typically PDF files are preferred because most computers come with a PDF viewer and/or it is free to download this software from Adobe's website.

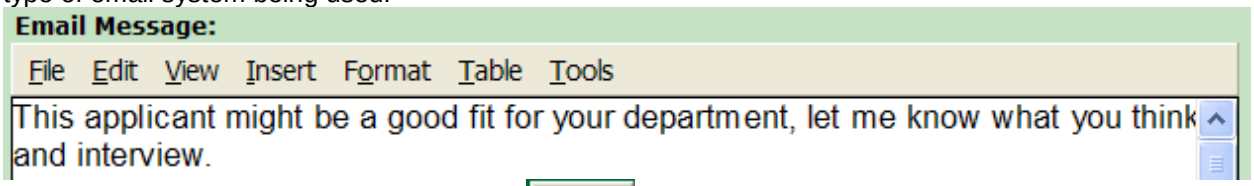


Of the available items listed under Documents and Reports, the User must select which to send. If the information displayed in the columns is not enough to identify which item to send the User can view the document by selecting the row and clicking on the View Doc button.

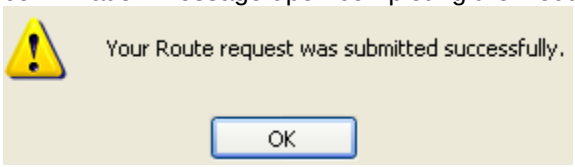


To select a document to route, click on the "Route?" field next to the item to be sent. Click the arrow to change the column from *No* to *Yes*. Selected Documents will be presented as separate attachments on the email message received.

When sending via email, the User may wish to include some text to go into the body of the email. The formatting of this text may be modified, but the appearance of the text in the email may depend on the type of email system being used.

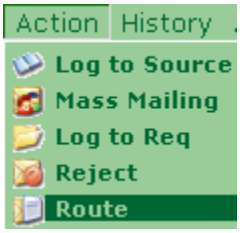

Email Message:
File Edit View Insert Format Table Tools
This applicant might be a good fit for your department, let me know what you think
and interview.

After making the desired selections, choose Ok to run the action. The system will display a confirmation message upon completing the Route.

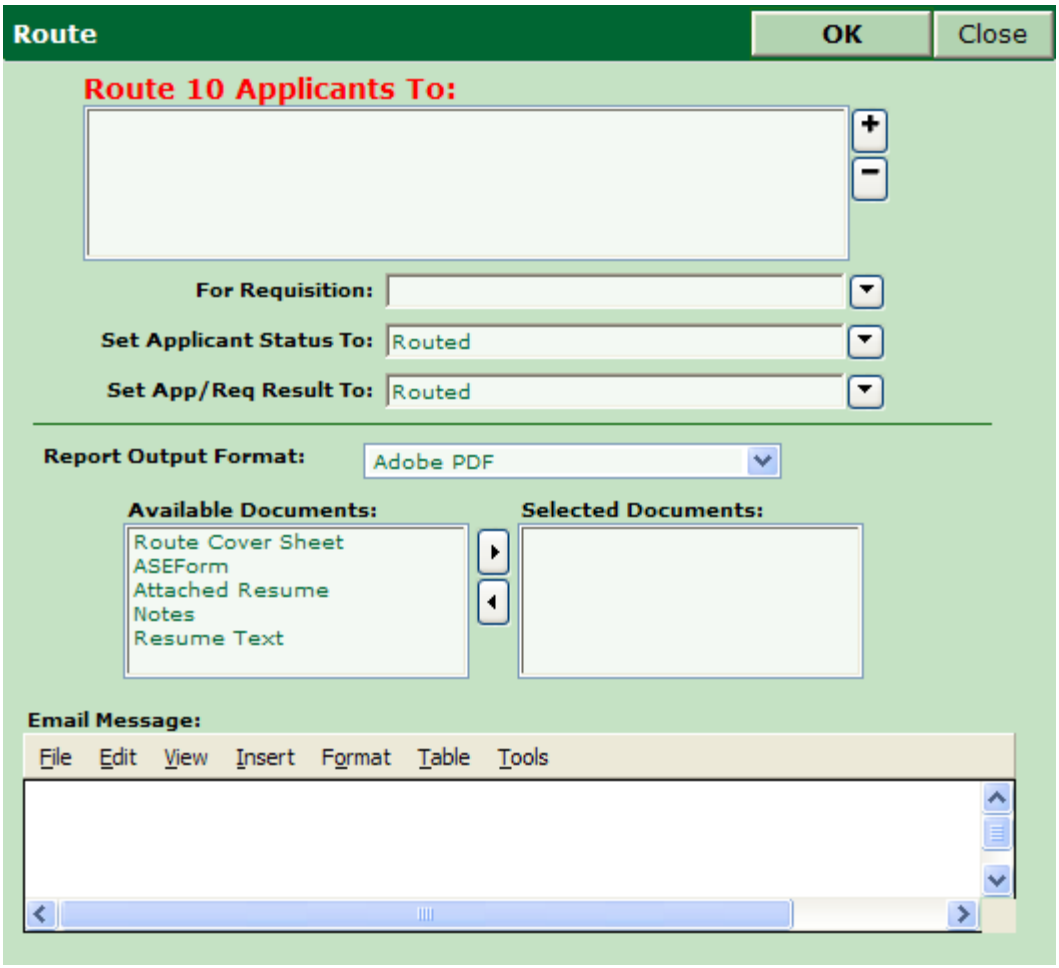


Mass Route

Groups of Applicants can be Routed in one step using the *Route* Action while in List View. To begin, choose *Route* from the Action main menu or click on the quick launch button located on the toolbar.



This Action is very similar to the single Route action. However, information about ALL of the Applicants on the list will be sent. The hiring manager will receive an e-mail package for each Applicant being routed. Notice that the title bar of the Action shows how many Applicants will be affected by this Action.



The document choices will be a compilation of all available documents. This means that some Applicants may not have all documents. If the User chooses a Requisition, the system will route the CSSForm that was submitted for that specific Requisition.

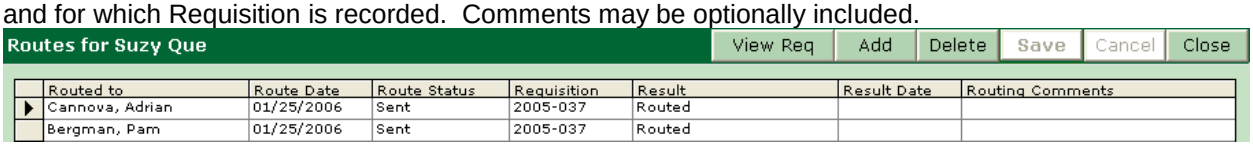
To make document selections use the arrows to move documents from left to right (from the Available column to the Selected column), there is no preview option in the mass Route Action. After making the desired selections, choose OK to run the Action. *The Route History for all of the selected Applicants will be updated after the Action is run.*

Routes History

The Routing is added to the *Routes* History for the Applicant.



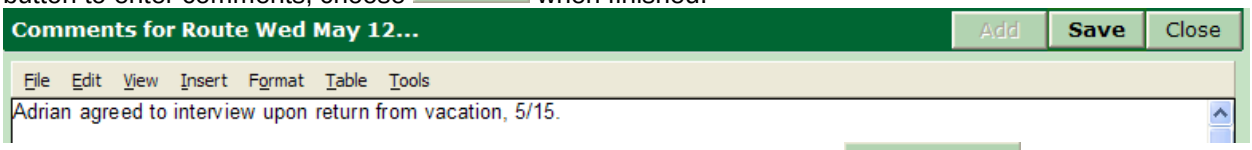
Information about whom the documents were routed to, who routed them, what date they were routed on, and for which Requisition is recorded. Comments may be optionally included.



Routed to	Route Date	Route Status	Requisition	Result	Result Date	Routing Comments
Cannova, Adrian	01/25/2006	Sent	2005-037	Routed		
Bergman, Pam	01/25/2006	Sent	2005-037	Routed		

The results of the routing can be recorded after the User receives feedback from the person the documents were sent to. The *Result* and the *Result Date* can be updated in the Route History.

In addition, *Routing Comments* can also be used to store additional information about the result. Click once in the *Routing Comments* field and then click the ▼ button to get a text window. Use the Add button to enter comments, choose Save when finished.

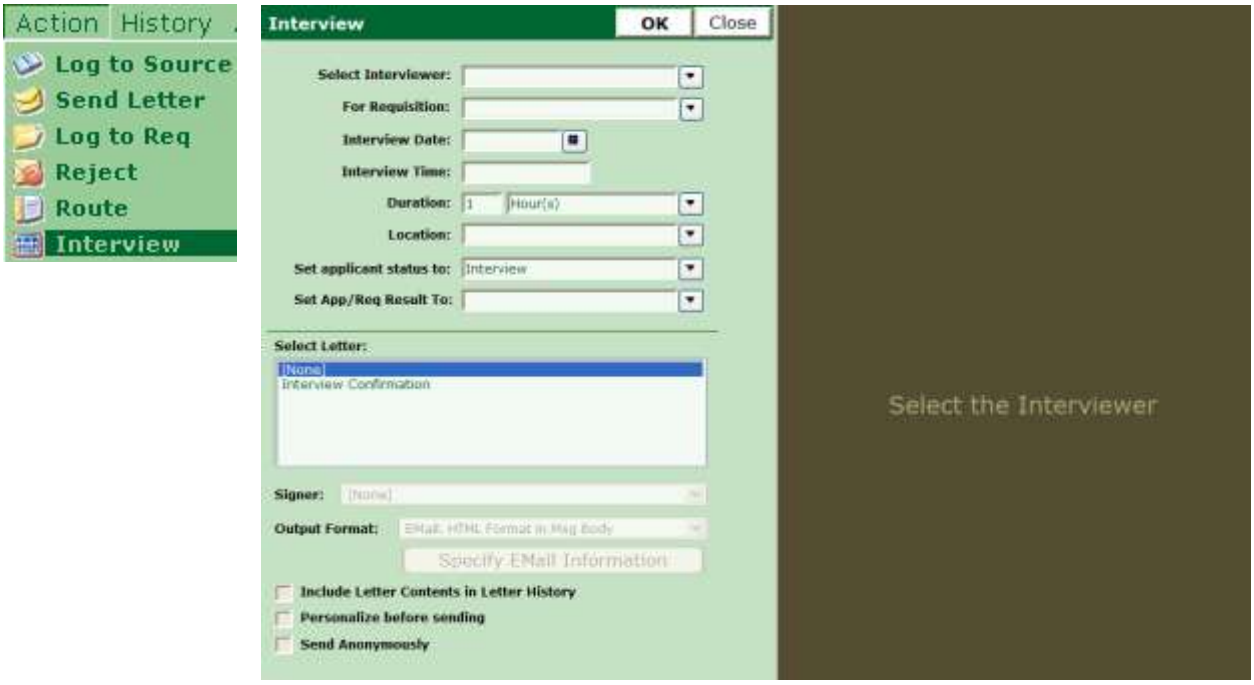

Comments for Route Wed May 12...
Add
Save
Close
File Edit View Insert Format Table Tools
Adrian agreed to interview upon return from vacation, 5/15.

If a Requisition was designated during the action, the User can use the View Req button to be 'ported' over to view the Requisition.

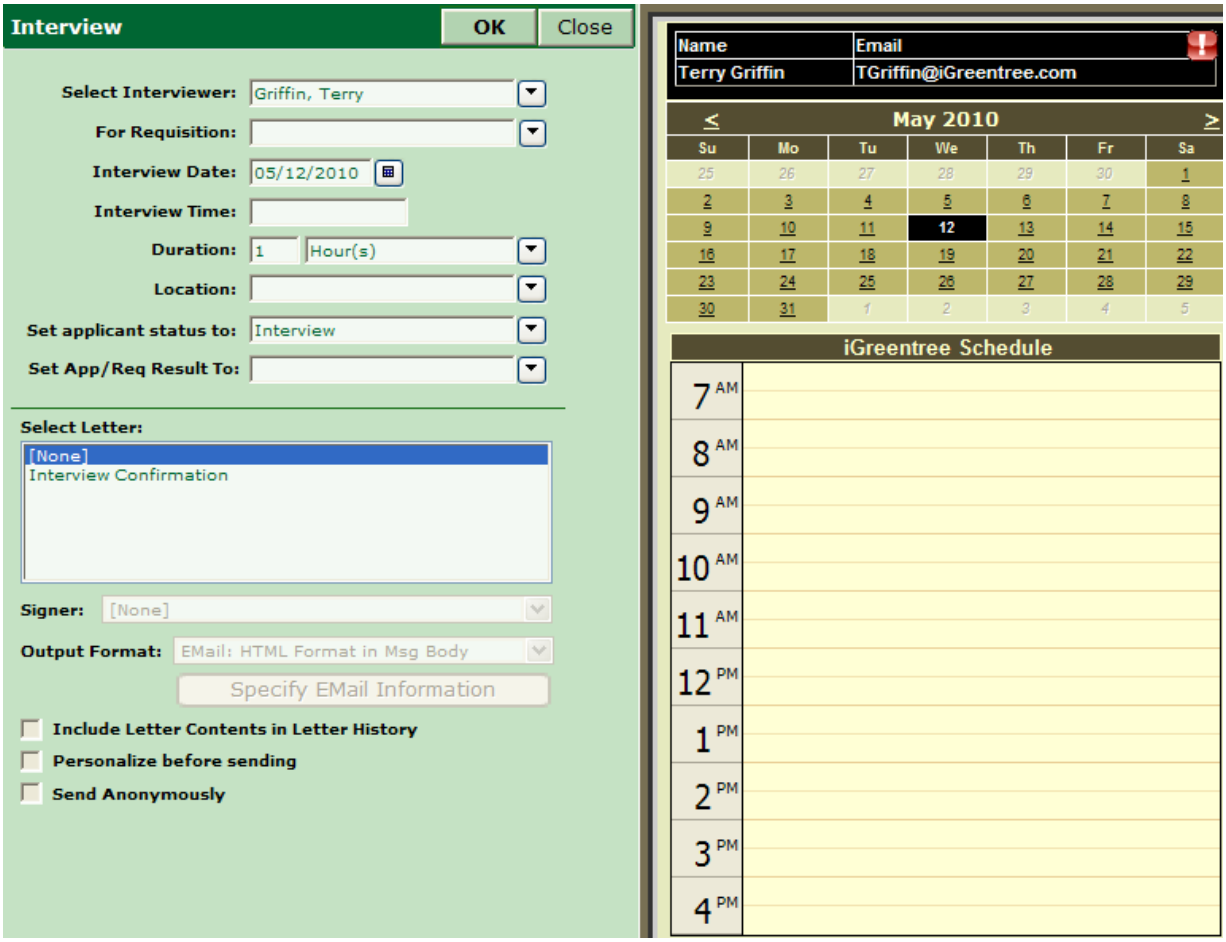
Interview

The *Interview* Action can be used to record dates, times and results of interviews. In addition, a letter can be generated for the Applicant confirming the appointment.

To begin, select *Interview* from the Action main menu or click on the quick launch button  located on the toolbar.



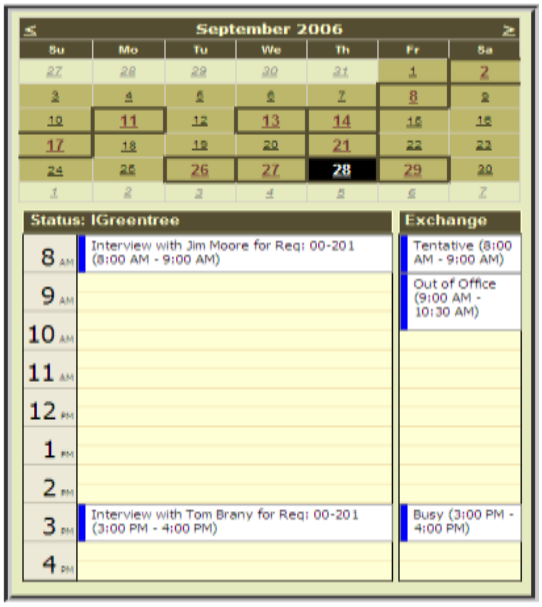
The Select Interviewer: field is a combined list of Hiring Managers and Recruiters. An Interviewer must be selected, once selected the calendar will populate the right hand side of the screen.

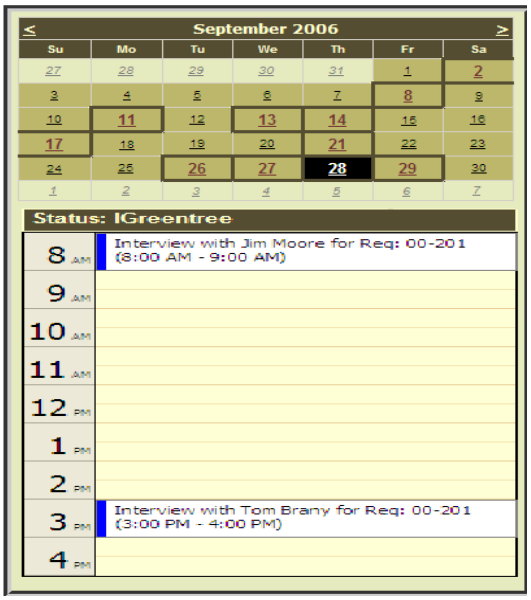


*I*f the selected Interviewer does not have an Exchange account, then you see only the appointments that have been made inside iGreentree. If the selected Interviewer does have an Exchange account, you can also see shared items from your calendar in Exchange to see availability for scheduling appointments. A marked date cell indicates that there is an appointment scheduled on that date.

With Exchange Server enabled:

Without Exchange Server enabled:


September 2006
Su Mo Tu We Th Fr Sa
Status: IGreentree
Exchange
Interview with Jim Moore for Req: 00-201 (8:00 AM - 9:00 AM)
Tentative (8:00 AM - 9:00 AM)
Out of Office (9:00 AM - 10:30 AM)
Interview with Tom Brany for Req: 00-201 (3:00 PM - 4:00 PM)
Busy (3:00 PM - 4:00 PM)


September 2006
Su Mo Tu We Th Fr Sa
Status: IGreentree
Interview with Jim Moore for Req: 00-201 (8:00 AM - 9:00 AM)
Interview with Tom Brany for Req: 00-201 (3:00 PM - 4:00 PM)

If this interview is associated with a particular Requisition, choose the Requisition. If it is an open interview for any of several openings the For Requisition *field can be left blank.* Interview Date *and* Interview Time *must be populated*. Duration *will auto populate 1 Hour(s); this can be overridden by the User. The location of the interview can be entered here, this can be helpful if a letter is generated and/or for reporting. The Applicant's Status will default to* Interview *and the User can select an* App/Req Result *for this Applicant.*

The User has the option to send a letter along with this Action or it can be run without one to simply record the interview. If the Applicant is interviewing with several people, and a letter is being generated it is best to generate the letter when entering the first person they will interview with so that the letter contains the appropriate start time for the interview.

Choose OK to run the action. A message confirming the success of the Action will display.



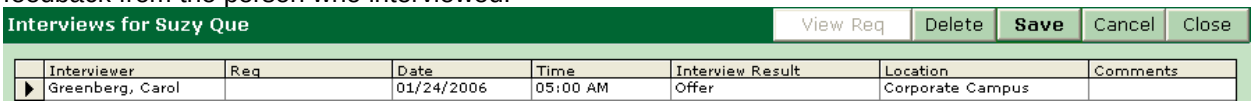
Click Continue to continue. More interviews can be scheduled before leaving this window. Once the last interview for this Applicant has been entered, click Close.

Interviews History

The Interview details are added to the *Interview* History for the Applicant, to view select *Interviews* from the *History* menu.



Interview Results can be entered in the Comments sections for each interview after the User receives feedback from the person who interviewed.



In addition, *Comments* can also be used to store additional information about the result. Click once in the *Comments* field and then click the ▼ button to open the text window. Use the Add button to be allowed to enter comments. Choose Save when finished.

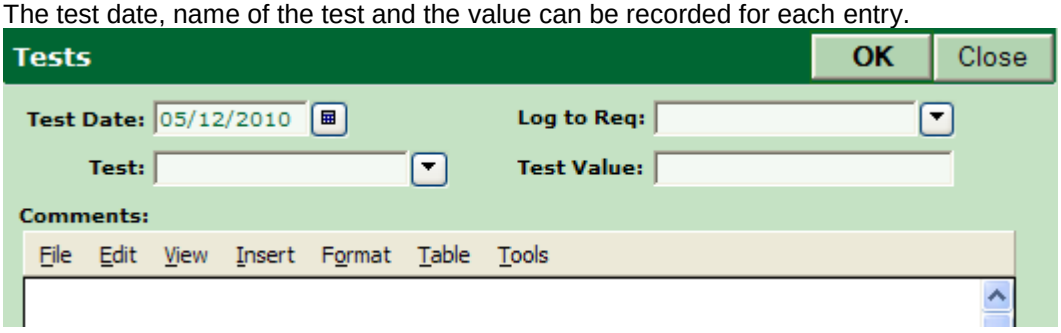
Test Results

Test Results can be used to record tests that an organization administers to the Applicant or tests that were administered by another organization. Examples include: basic computer skills scores, Drivers License information, psychological exams, and completion of reference checks. The *Test Results* Action can also be used to record other things that have corresponding values and dates, such as Reference checks and drug screen results.

Select *Test Results* from the *Action* main menu or click on the quick launch button  located on the toolbar.

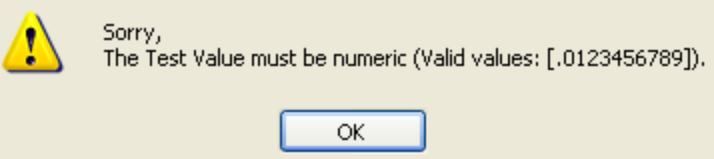


The test date, name of the test and the value can be recorded for each entry.



A Requisition can also be associated with each test entered. If an Applicant was tested for a specific Requisition that Requisition should be selected in the Log to Req *field. Selecting a Requisition will log the Applicant to that Requisition when* OK *is selected, if they are not already logged to it.*

Each *Test* has a *Test Type* of either Text or Number designated in Codes Maintenance. If a *Test* is selected and the *Test Value* entered does not match that test's *Test Type* an error will generate and the *Test Result* cannot be saved.



The User will have to ch*ange the* Test Value *to match the Test Type designated in Codes Maintenance for that* Test*. See the* Administration and Maintenance *chapter for more information.*

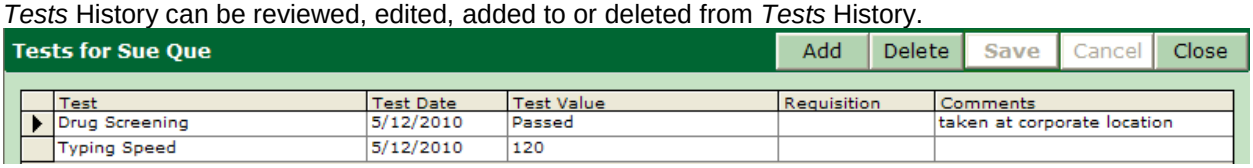
When the Action has been completed the User will be presented with the option to continue adding Test Results or return to the Applicant main screen.

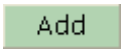
Tests History

The test information is stored in the *Tests* History for the Applicant.



Tests History can be reviewed, edited, added to or deleted from *Tests* History.



If unsure whether a test has been added it is faster to go direct to the *Tests* History and check. If it is not there, simply click 

to enter it.

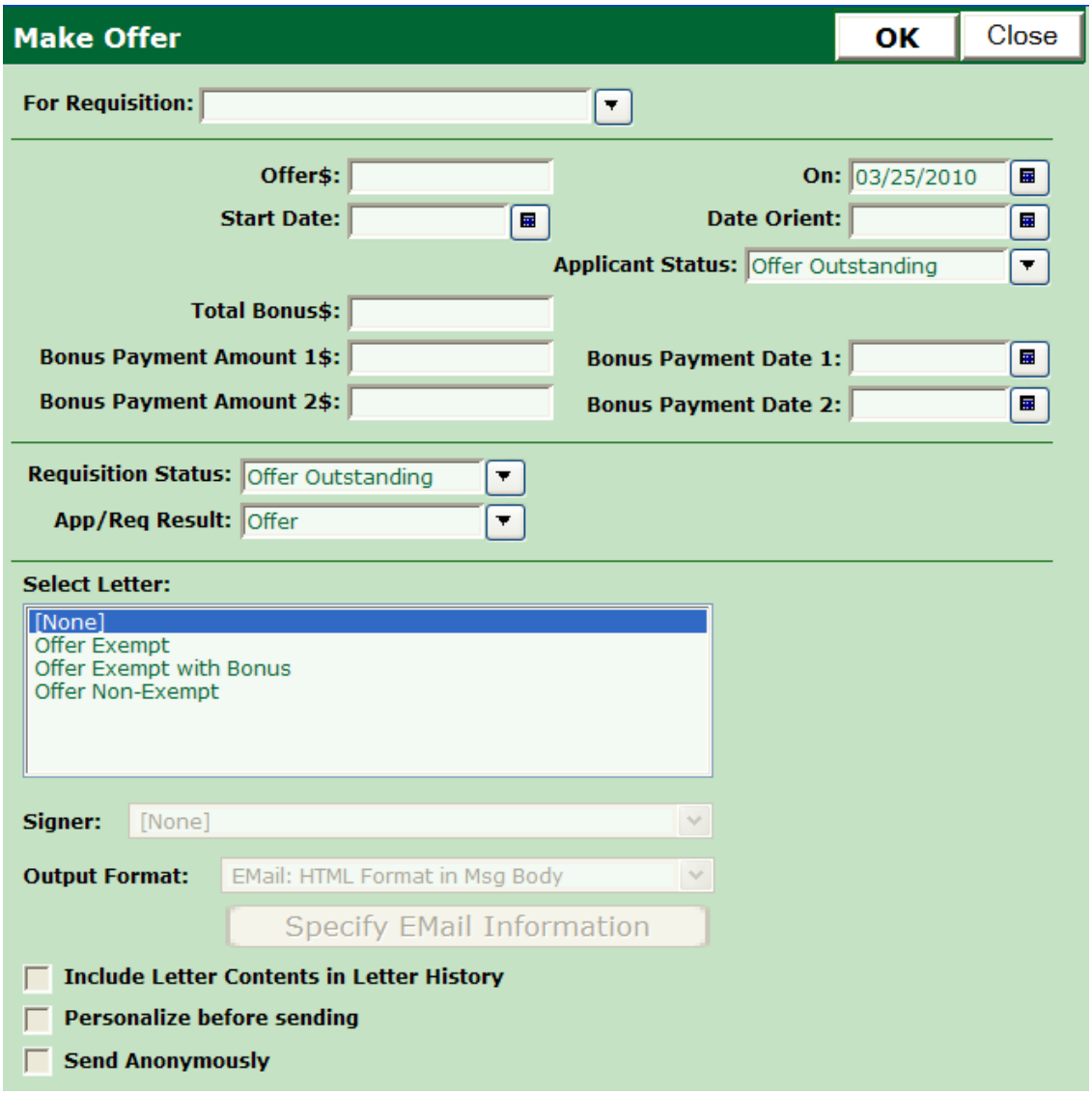
Make Offer

Use the Make Offer action to record information about offers and to generate offer letters. The *Offer* Action is typically used when either a decision has not been made by the Applicant or when all the details have yet to be finalized. If the Applicant accepts and all the information is available, then this Action can be skipped and the User can go directly to the *Hire* or *Fill* Action.

To run, select *Make Offer* from the Action main menu or click on the quick launch button  located on the toolbar.



If a previous offer has been made, some data may already appear in the Offer *form. The User can overwrite this data for the new offer. If this is the first offer the Applicant has received the form will be blank.*



Select, from the For Requisition *field, the Requisition for which the offer is being extended. Enter the offer dollar amount in a manner consistent with the design of the offer letter being chosen (i.e. annual or hourly).*

Populate any other fields where the information is known. Some fields will auto populate (Offer Date and Applicant Status for example). These fields can be overwritten by the User if necessary. Fields in this window may be required before the action will run. If so, a message will warn the User if required data is missing.

If an offer letter is to be generated, select a letter and verify that the Output Format is appropriate.

Choose OK to run the action and generate the letter if selected. Depending on if a letter was selected and the output type, the User will either be brought to the Applicant main screen, Personalize letter screen, or e-mail letter screen. The Letter functionality operates identically throughout the system, please refer to *Send Letter* for more detail.

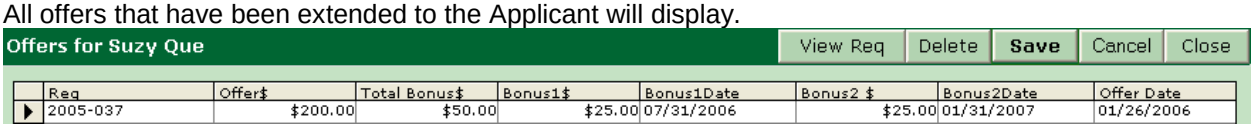
Offers History

Any offer information that is completed in the *Offer* Action will be added to the *Offers* History for the Applicant.

To review the offer information, go to *Offers* under the History menu for the Applicant.



All offers that have been extended to the Applicant will display.



	Req	Offer$	Total Bonus$	Bonus1$	Bonus1Date	Bonus2 $	Bonus2Date	Offer Date
▶	2005-037	$200.00	$50.00	$25.00	07/31/2006	$25.00	01/31/2007	01/26/2006

The entire Requisition can be displayed by clicking the 

button.

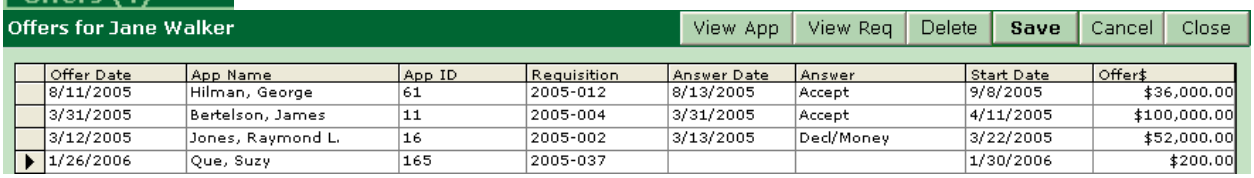
The *Offers* History has also been updated in the Hiring Manager's record.

To view the Hiring Manager's *Offers* History, go to Hiring Mgrs menu and choose *QuickSearch.* Search for the Hiring Manager that was designated for the Requisition that was filled.



Select *Offers* from the History menu.





	Offer Date	App Name	App ID	Requisition	Answer Date	Answer	Start Date	Offer$
	8/11/2005	Hilman, George	61	2005-012	8/13/2005	Accept	9/8/2005	$36,000.00
	3/31/2005	Bertelson, James	11	2005-004	3/31/2005	Accept	4/11/2005	$100,000.00
	3/12/2005	Jones, Raymond L.	16	2005-002	3/13/2005	Decl/Money	3/22/2005	$52,000.00
▶	1/26/2006	Que, Suzy	165	2005-037			1/30/2006	$200.00

If the Applicant declines an offer that was extended, their reason for declining can be recorded. Keeping declination reasons can be useful in justifying change (i.e. salary grade adjustments, bonus incentive structures, hours, etc.). To record a decline decision, enter the *Answer Date* and select the appropriate *Answer.*

If the offer is accepted the next step is to run either the *Hire* or *Fill* Action.

In addition, the Applicant's *Status* must be updated and the Requisition must be reactivated by changing the Requisition's *Status.*

NOTE: Offers are also recorded in the Requisition's Offers *History and in Hiring Manager's* Offer *History.*

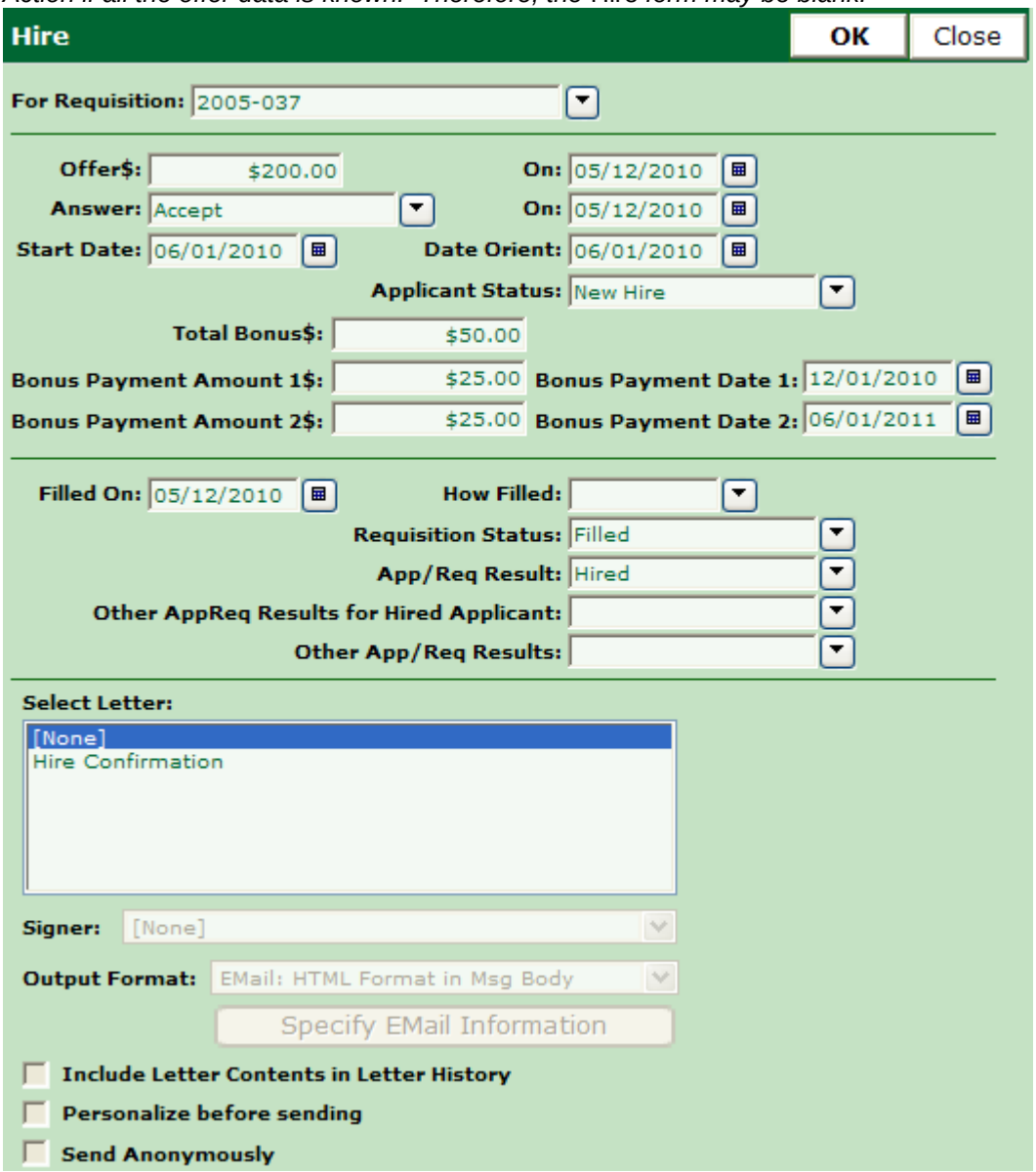
Hire

To finalize the hiring process for a Requisition either the *Hire* Action (Applicant Action) or the *Fill* Action (Requisition Action) must be completed. Either of these two Actions will update all of the applicable areas of the system in one step as well as produce a Hire Confirmation letter if needed.

Select *Hire* from the Action main menu or click on the quick launch button  located on the toolbar.



If an offer has been previously entered for this Applicant, the most recent offer data will default into the Hire *form. However, the* Offer *Action does not have to be run first; Users can go straight to the* Hire *Action if all the offer data is known. Therefore, the* Hire *form may be blank.*



The User should populate all of the relevant fields. The Total Bonus *amount can be further split into multiple payments and payment dates for ease of reporting and/or inclusion in the hire confirmation letter.*

The Filled On *date will be automatically populated with the current date. This date can be overwritten in the circumstance where the Applicant accepted the position on an earlier date. The* Filled On *date is often used for calculating the Time-To-Fill.*

How Filled *is a field used to define the Applicant's transition into the Requisition that they are filling. In other words, is the Applicant an external Applicant or is it a promotion, transfer, etc.*

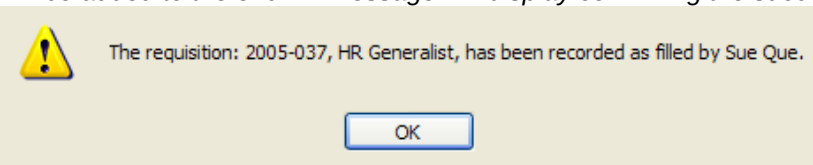
The Hire *Action will default to update the Requisition* Status *to reflect the position is filled. This will remove the posting from CSS if it was not already removed by the* Offer *Action. The Applicant's* Result *will also be updated to reflect that they were hired.*

Other AppReq Results for Hired Applicant *refers to other positions the New Hire may have applied for. Running this action will change ALL OTHER* App/Req *Results that this Applicant has applied for.*

Other App/Req Results *field will update all other candidates who are logged to this Requisition. Those Applicants who have a previously entered* Result *that is final for this Requisition will not be affected.*

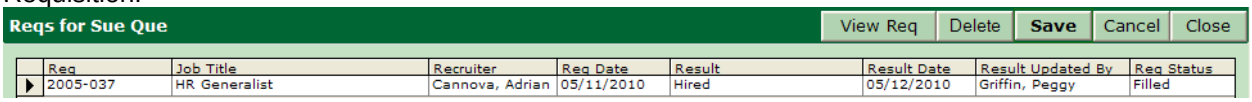
Users can select a letter at this point, or, if no letter is needed the Select Letter *can be left as [None]. A reminder to send a letter will prompt if one is not selected, however, if* Continue *is chosen the User will be allowed to proceed without one. Other reminders may appear if the User leaves required information blank.*

If the Requisition has multiple openings (i.e. Total Openings *greater than 1), the system will create a "Child Req" that it fills. The Child Req will have a Requisition number similar to the original, but at #01 will be added to the end. A message will display confirming the successful completion of the* Hire *Action.*



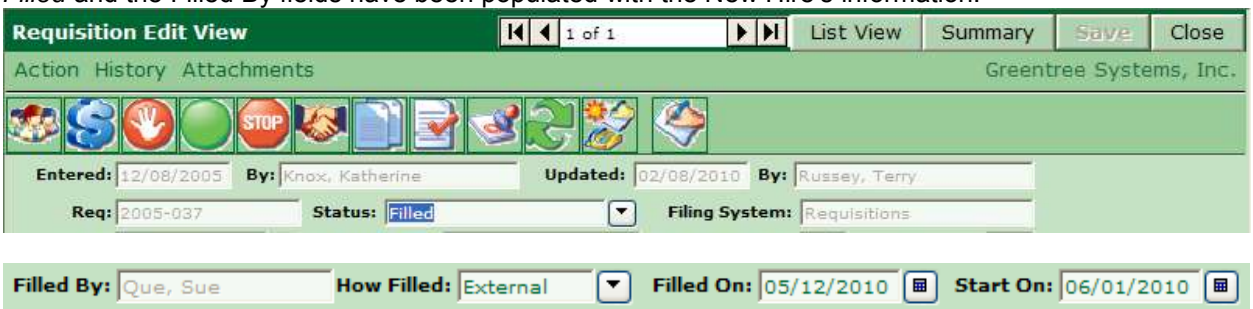
The *Hire* Action finalizes the hire process and updates additional fields in the database.

Applicant's *Reqs Applied For* History is updated to reflect that the Applicant has been hired for the Requisition.



The User can click 

to view the updated Requisition. The Requisition now has a *Status* of *Filled* and the Filled By fields have been populated with the New Hire's information.



The Applicant's *Offers* History is also updated (this is also viewable from the Requisition's *Offers* History and Hiring Managers *Offers* History). Data in these fields can be altered if any of the offer information unexpectedly changes.

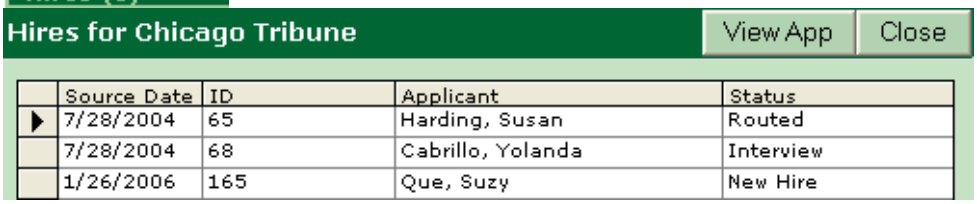


Source History is also updated by the Applicant's *Hire* Action if the Applicant was logged to a Source for this specific Requisition. To view the Source *Hires* History, go to Sources/Expenses menu and choose *QuickSearch.* Search for the Source that was designated for the Applicant with regards to the Requisition that was filled.

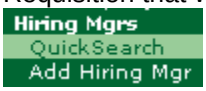


Select *Hires* from the History menu.



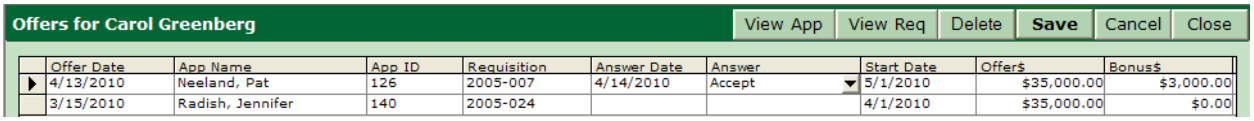


Hiring Manager's record also has History items that are updated by the Applicant's *Hire* Action. The Hiring Manager's *Offers* History will be updated. To view the Hiring Manager's *Offers* History, go to Hiring Mgrs menu and choose *QuickSearch.* Search for the Hiring Manager that was designated for the Requisition that was filled.



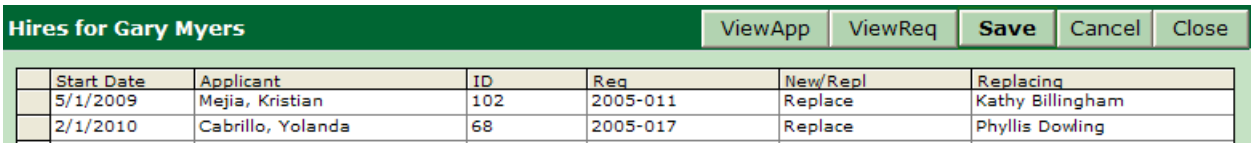
Select *Offers* from the History menu.





In addition, the Hiring Manager's *Hires* History has been updated. To review, select *Hires* from the History menu.





Dup Check

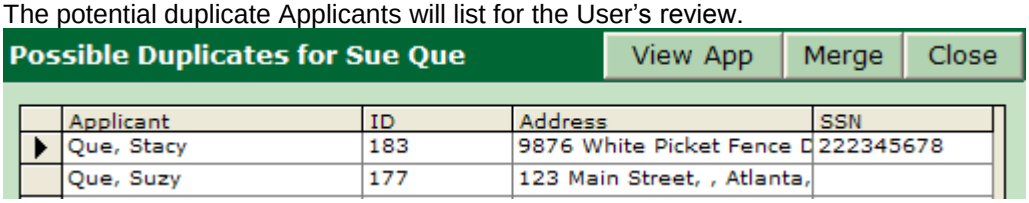
Applicant duplicate check is performed automatically by Resume Processing and upon Saving during manual entry. How duplicates are identified and what happens to them is based upon Maintenance settings for each of these entry types. (See the *Administration and Maintenance* and *Module Maintenance* chapters of this manual for details.) Sometimes the potential duplicates are set up to be placed into a special Applicant filing system (typically called *Possible Duplicates*) for easy identification. Other times, settings may allow duplicates to be entered into the database without any special flag to designate that the Applicant may in fact be a duplicate. Regardless of how the duplicate was entered, the management of duplicates is the same.

When a duplicate record is discovered, the User should be viewing the Applicant record that may eventually be eliminated. This will ensure that the older record will be the record retained and that the *Entered* date will reflect the original date entered.

From the Action menu, select *Dup Check* or click on the quick launch button  located on the toolbar.



The potential duplicate Applicants will list for the User's review.

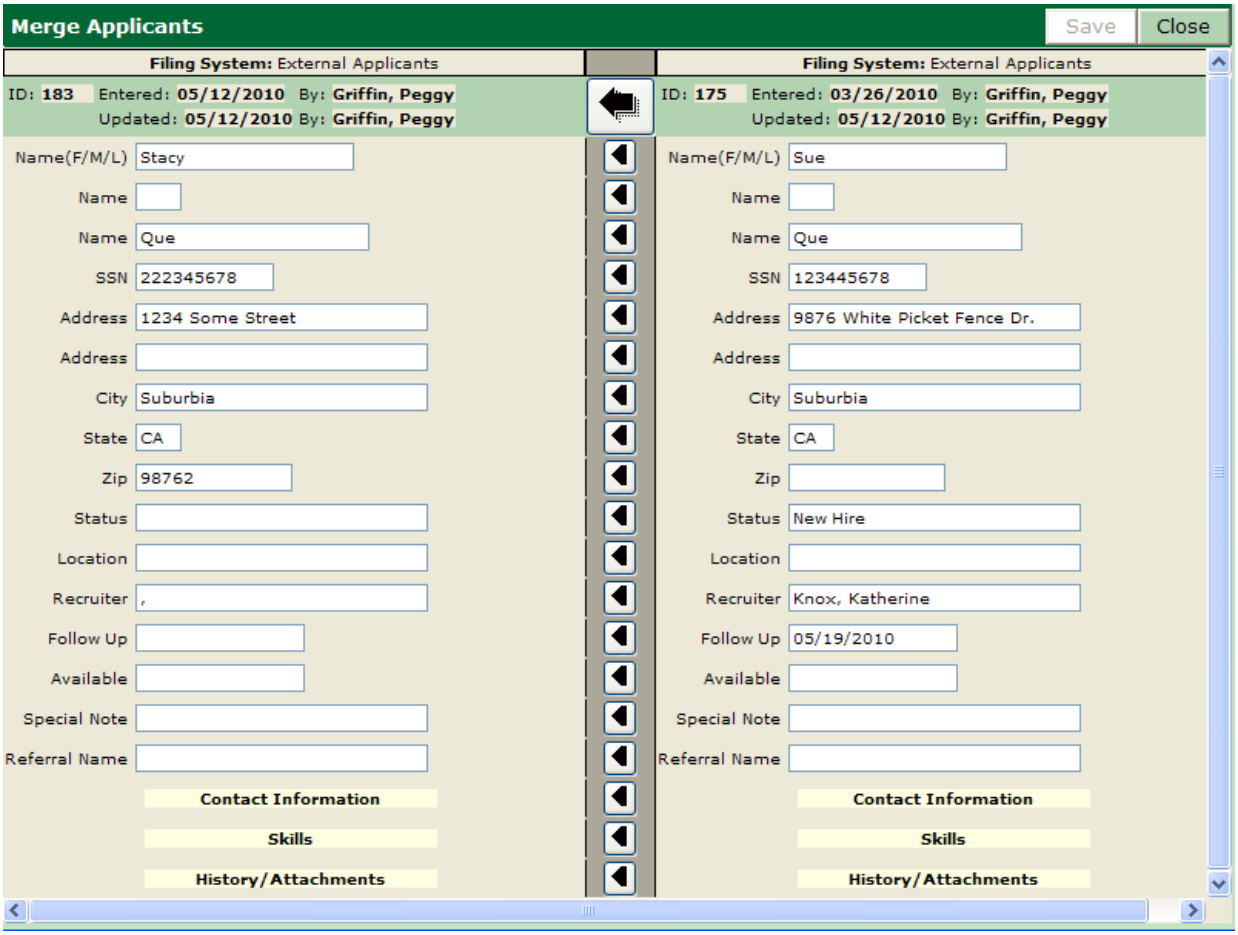


Clues to help determine whether this is the same person include address and social security number. *If there is no match in the list, click* Close *to exit the duplicate window*. If an Applicant on the list might be a duplicate of the newer Applicant, highlight the name, then select View App. This will open a new window to allow you to compare the records more closely.



The User can now compare other Attachment data such as resumes, Applications, etc to determine if the Applicants are in fact one and the same. *If it is not the same person, close the second window using the* Close *button.*

If an Applicant is the same person, click the Close *button and then click* Merge. The Applicants will be displayed in a side-by-side view.



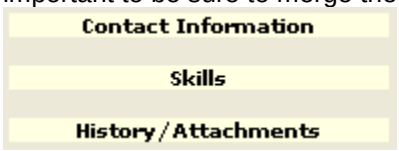
If this is not the same Applicant, Close *to get back to the Duplicate screen and pick a different possible duplicate.*

The Applicant who was selected from the Possible Duplicate *list is displayed on the left and the record that was started with is displayed on the right. If the User began with the newer record which is to be merged,* then the arrows should be merging the data from the newer record into the older record.

Select the  arrows to move the information from one field on the newer Applicant to the same field on the existing Applicant.

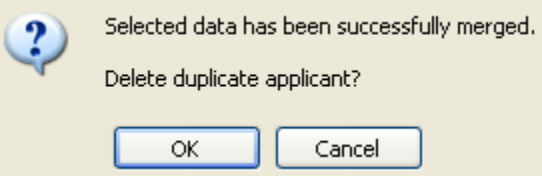


The above would update the older record with the new address. When merging one field at a time, it is important to be sure to merge the Contact Information, Skills, and History/Attachments.

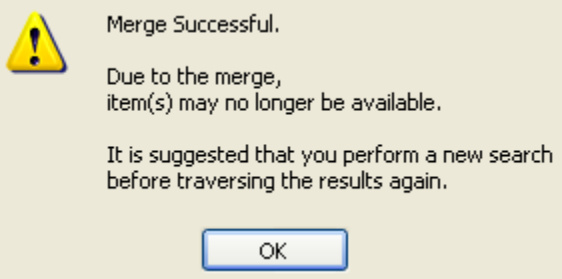


The User can also select the large arrow  to move ALL of the information from the newer Applicant record to the older Applicant record. This is the easiest choice in most cases, but Users must be careful to not merge data and overwrite specific, exclusive information such as *Referral Name*, *Recruiter*, etc.

When finished merging the data, click Save so that the two records are combined into one. A message will display confirming a successful merge and asking if the duplicate record can be deleted.



It is not necessary to keep both records any more, since all the data is stored in one. Choose OK to proceed with the deletion of the duplicate. The User will be presented with another merge confirmation message that also cautions about the deleted record's impact on the present search.

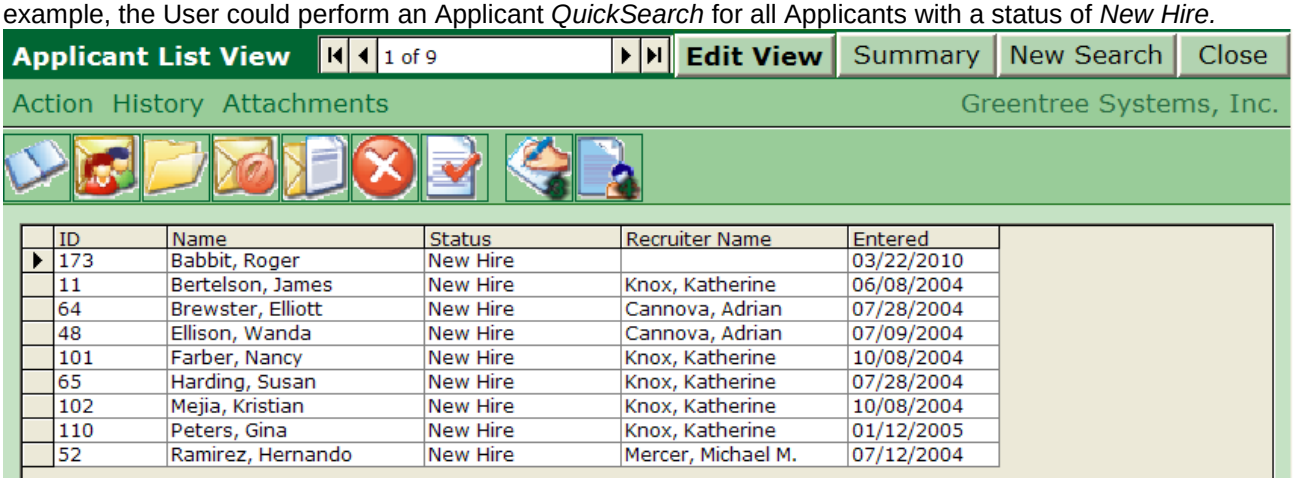

Merge Successful.
Due to the merge,
item(s) may no longer be available.
It is suggested that you perform a new search
before traversing the results again.
OK

Click OK to return back to the Applicant main screen. NOTE: The screen will be blank since the record the User was viewing has been deleted. Either proceed to the next Possible Duplicate or start a new search.

Reporting

Although some Applicant Reports can be found in ReadyReports (see the *Reporting* chapter of this manual), the reports that are found in the Applicant Action menu are search dependent. That is, the User must first run a search to determine the data to be used in the report. Running the search first also allows the User to selectively remove (if desired) any Applicants that should not be included in the report.

The Applicants are chosen by performing a search (either a *QuickSearch* or an *Advanced Search*). For example, the User could perform an Applicant *QuickSearch* for all Applicants with a status of *New Hire.*



ID	Name	Status	Recruiter Name	Entered
173	Babbit, Roger	New Hire		03/22/2010
11	Bertelson, James	New Hire	Knox, Katherine	06/08/2004
64	Brewster, Elliott	New Hire	Cannova, Adrian	07/28/2004
48	Ellison, Wanda	New Hire	Cannova, Adrian	07/09/2004
101	Farber, Nancy	New Hire	Knox, Katherine	10/08/2004
65	Harding, Susan	New Hire	Knox, Katherine	07/28/2004
102	Mejia, Kristian	New Hire	Knox, Katherine	10/08/2004
110	Peters, Gina	New Hire	Knox, Katherine	01/12/2005
52	Ramirez, Hernando	New Hire	Mercer, Michael M.	07/12/2004

To report on the search results, select *Applicant Reports* from the Action menu, either in List View or Edit View or by selecting the quick launch button  located on the toolbar.

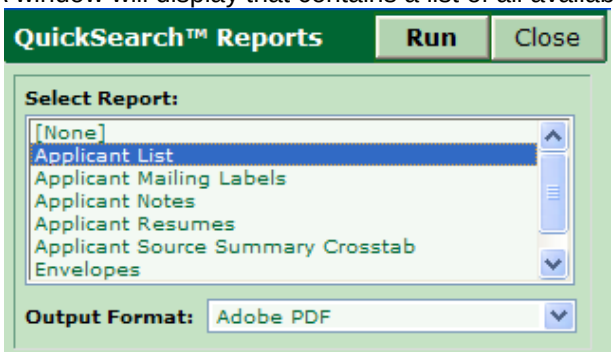
List View:



Edit View:



A window will display that contains a list of all available search dependent Applicant Reports.

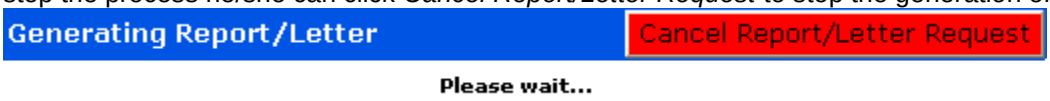


If the User is in *Summary* or *Edit View,* the report will be generated and contain ONLY the information for the Applicant that is being displayed. If the Action is selected while in *List View* the report will be generated with each of the displayed Applicants in the report.

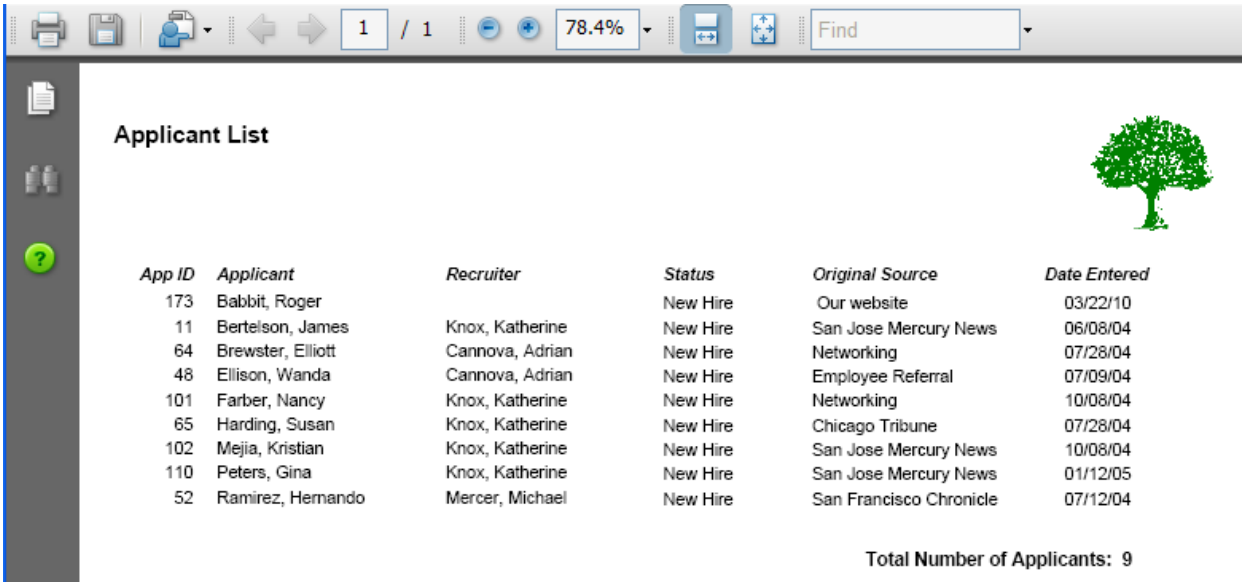
The User can select a report from the list by clicking the name of the report so that it is highlighted. The Output Format *defaults to* Adobe PDF*, but it can be changed to another format.*

Click 

to generate the report. Be patient while the system gathers data. If the User needs to stop the process he/she can click *Cancel Report/Letter Request* to stop the generation of the report.



Once completed, a new window will open to display the report in the selected format. *Although the Applicants included in the report are defined by the search that was performed, the information that will display about those Applicants is pre-defined by the individual report settings.*



Applicant List

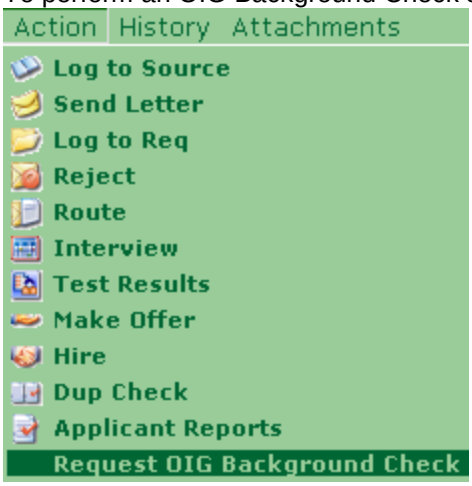
App ID	Applicant	Recruiter	Status	Original Source	Date Entered
173	Babbit, Roger		New Hire	Our website	03/22/10
11	Bertelson, James	Knox, Katherine	New Hire	San Jose Mercury News	06/08/04
64	Brewster, Elliott	Cannova, Adrian	New Hire	Networking	07/28/04
48	Ellison, Wanda	Cannova, Adrian	New Hire	Employee Referral	07/09/04
101	Farber, Nancy	Knox, Katherine	New Hire	Networking	10/08/04
65	Harding, Susan	Knox, Katherine	New Hire	Chicago Tribune	07/28/04
102	Mejia, Kristian	Knox, Katherine	New Hire	San Jose Mercury News	10/08/04
110	Peters, Gina	Knox, Katherine	New Hire	San Jose Mercury News	01/12/05
52	Ramirez, Hernando	Mercer, Michael	New Hire	San Francisco Chronicle	07/12/04

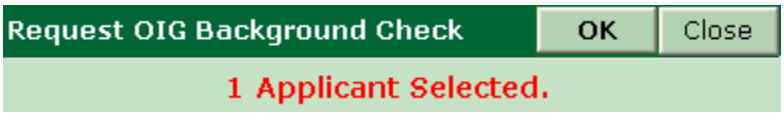
Total Number of Applicants: 9

Request OIG Background Check

The Office of Inspector General (OIG) established a program to exclude individuals and entities affected by various legal authorities. The basis for exclusion include convictions for program-related fraud and patient abuse, licensing board actions and default on Health Education Assistance Loans. A list of all currently excluded parties called the List of Excluded Individuals/Entities is maintained by the OIG.

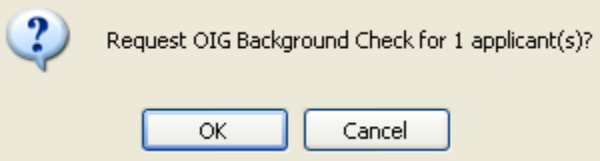
To perform an OIG Background Check select *Request OIG Background Check* from the Action menu.





The number of Applicants selected will appear in red. If correct, click OK.

The User will be presented with two confirmation screens before the action can been completed. Click OK on both to continue.





Once the action has been completed the User will be notified that his/her request was submitted and the OIG Status field (on the Applicant base record) will default to Pending.

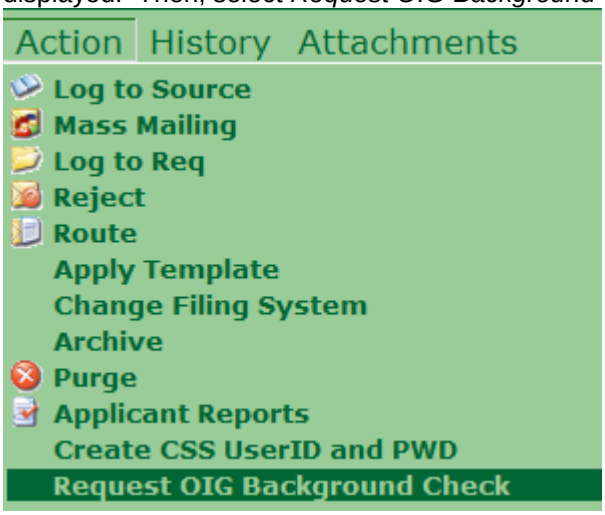
Completing this action will initiate lookups for all requested Applicants in the list in the OIG Exclusions database, using the parameters specified in *Maintenance* | *System Settings* | *Settings Group: OIG Processing*. If the Applicant's name is not found, then the OIG Status field in his/her record is populated with "Clear" and today's date. If the Applicant's name is found, then the Applicant's Status and AppReq Result are populated with "Excluded" or whatever codes are specified by the iGreentree System Administrator in *Maintenance*.

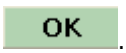


This is an optional service available from Greentree and there is a nominal fee associated with it. To obtain more information please contact your iGreentree Administrator.

Mass Request OIG Background Check

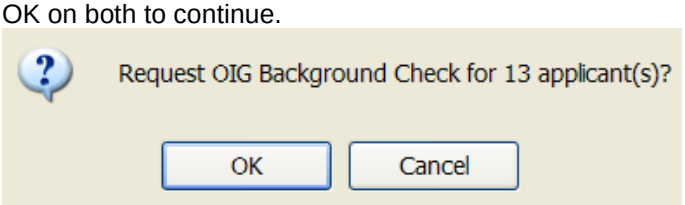
The Mass Request OIG Background Check is a request for an OIG Background Check for a list of Applicants at the same time. To perform a mass request, the User must have the *Applicant List View* displayed. Then, select *Request OIG Background Check* from the Action menu.



The number of Applicants selected will appear in red. If correct, click 

.

The User will be presented with two confirmation screens before the action can been completed. Click OK on both to continue.





The OIG Status field for all Applicants in the list will be updated to *Pending*..

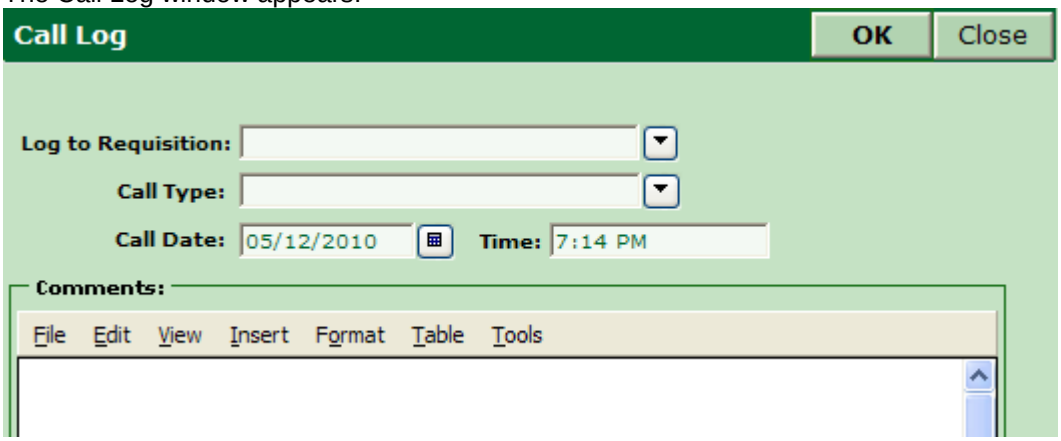
Call Log

The purpose of the Call Log is to provide a single focal point to log all communications with an Applicant and/or about a Requisition. A call log entry can be entered when reviewing an Applicant, a Requisition or an Application.

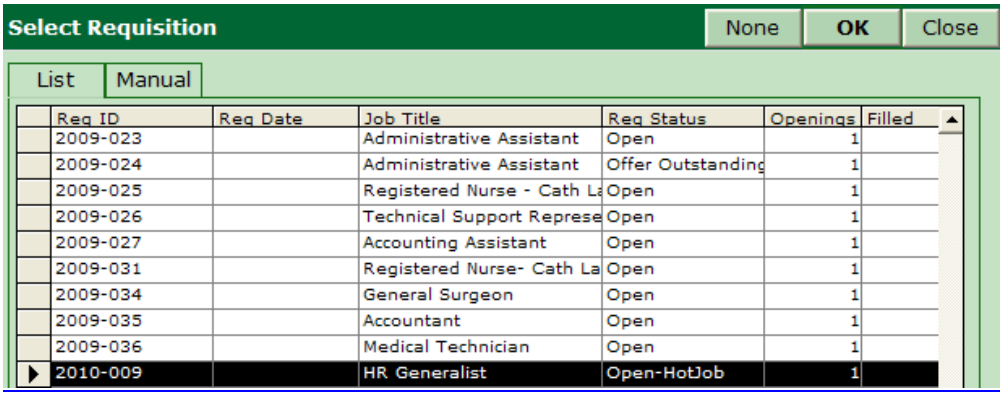
When reviewing an Applicant from the *Applicant Edit View* screen, click *Call Log* from the *Action* menu or click on the quick launch button  located on the toolbar.



The Call Log window appears.



The value specified in the *Log to Requisition* field determines whether the Call Log is logged to the Applicant or the Requisition. To log a call to an Applicant, leave the *Log to Requisition* field blank. To log a call to a Requisition, click the  button in the *Log to Requisition* field and select the Requisition.

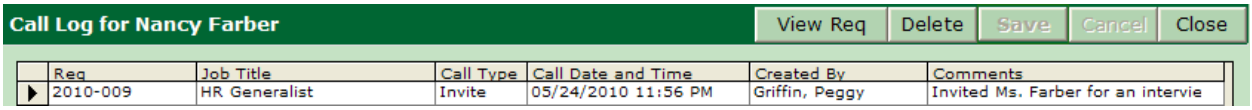


The Requisition can be selected from the list by clicking anywhere on the row corresponding to the Requisition. The Requisition number can also be entered by clicking on the *Manual* tab then typing the Requisition number into the *Req* field and clicking **OK**.

Select the Call Type, Call Date and Time then enter the relevant information in the Comment field and click **OK**. The User is returned to the *Requisition Edit View* screen.

To review the Call Logs, select *Call Log* from the History menu.





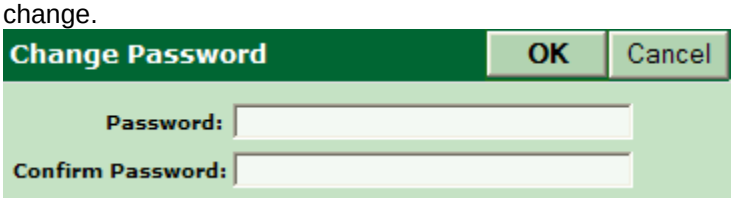
To delete a Call Log entry, click on the **Delete** button. A Call Log entry can not be edited but can be deleted and re-entered, if needed.

Change Password

The Applicant's *CSS Password* was created by the Applicant in CSS and is stored within iGreentree but encrypted for privacy purposes. If a User needs to manually change a password for an Applicant they can select *Change Password* from the Action main menu or click on the quick launch button  located on the toolbar.

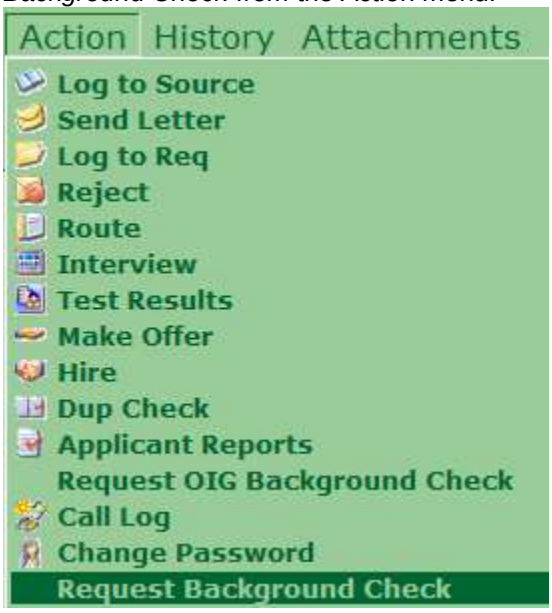


A *Change Password* window will display allowing the User to override the existing password with a new one. The User must type the new password twice to verify it is correct because the entry is masked for security purposes and cannot be verified by visually inspecting it. Click OK to complete the change.

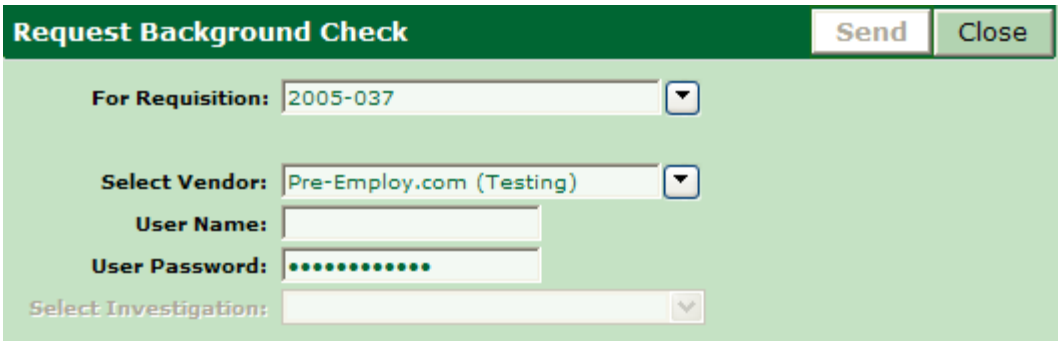


Request Background Check

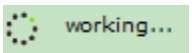
One of the final steps in the hiring process often is performing a background check on an Applicant or new hire. The iGreentree System has the ability to send and receive electronic requests for background checks if it is supported by your vendor. To request a background check for an Applicant, select *Request Background Check* from the Action menu.

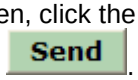


Fill in the fields in the *Request Background Check* form (*Requisition, Select Vendor, User Name and User Password)* and then click outside the last field entered (anywhere on the form). The Requisitions listed are those to which the Applicant has applied.

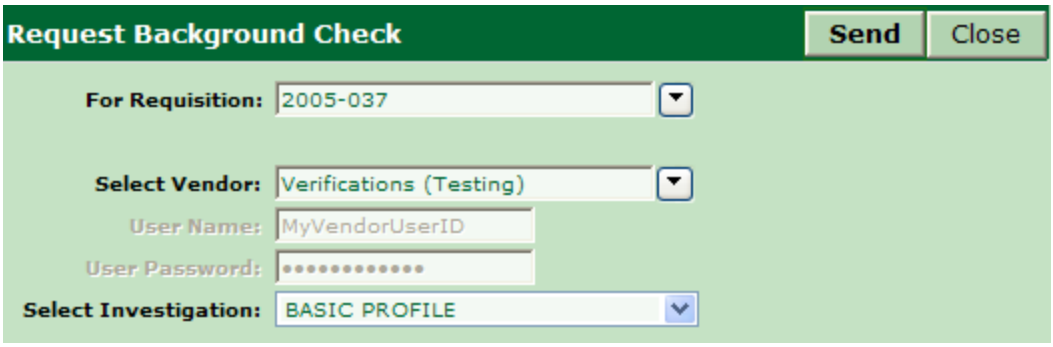


Note that the *User Name* and *User Password* are those associated with your background check vendor and must have been set up in advance with your vendor. Also, the vendor information must also be set up in iGreentree under *Maintenance* | *Codes* | *BackgroundCheckVendors*. Refer to the *Module Maintenance Chapter* for details.

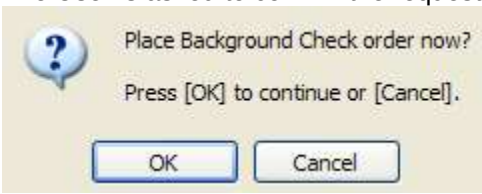
Once all fields are entered, 

appears on the form while the vendor investigation types are retrieved. Then, click the  button in the *Select Investigation* field to select the desired investigation type and click 

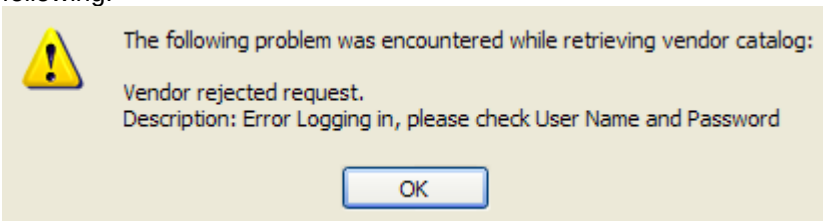
.



The User is asked to confirm the request. Click OK to send the request and Cancel to abort it.



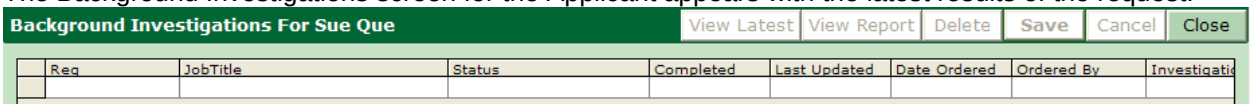
If there is a problem placing the request with the vendor, an error message will appear similar to the following:


The following problem was encountered while retrieving vendor catalog:
Vendor rejected request.
Description: Error Logging in, please check User Name and Password
OK

To check on the status of a background check request, select *Background Investigations* from the History menu.



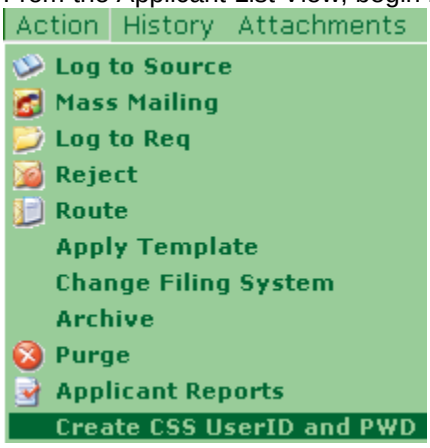
The Background Investigations screen for the Applicant appears with the latest results of the request.

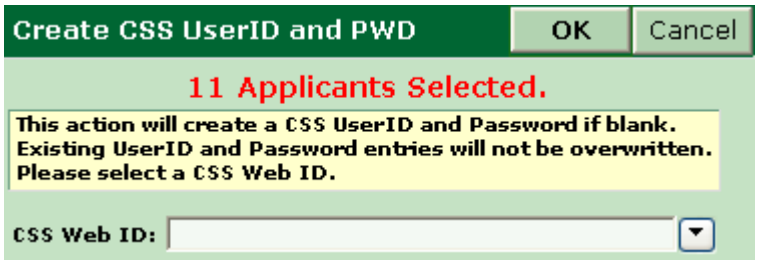


Mass Create CSS UserID and PWD

This action allows the User to assign system generated CSS UserID and Passwords to individuals. Once the action has been completed you can use a mass mailing to send an email notification to the Applicant(s). If a UserID and Password already exist the system WILL NOT create or override their current information.

From the Applicant List View, begin by selecting *Create CSS UserID and PWD* from the Action menu.




Create CSS UserID and PWD
OK
Cancel
11 Applicants Selected.
This action will create a CSS UserID and Password if blank.
Existing UserID and Password entries will not be overwritten.
Please select a CSS Web ID.
CSS Web ID:

The User will now need to identify the CSS Web ID for these Applicants, usually Internal or External although other options may be available. Once the Web ID has been selected click OK to continue, the User will be notified when the action is complete.

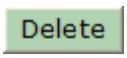
Other Mass Actions

There are several Mass Actions that may be used by the designated iGreentree Administrator. The *Apply Template, Change Filing System, Archive* and *Purge* actions are often restricted for other Users. For more information about these Actions, see the *Administration and Maintenance* chapter of this manual.

Editing History

From List, Summary or Edit View, *History* can be viewed. Notice that although some of the fields within *History* can be updated directly (such as Comments), most of the data within History comes from *Actions*.



If data within *History* is incorrect, the User can select the incorrect line and click the 

button to remove the entire row. Then re-use the appropriate Action to enter the correct data.

Searching

Objectives

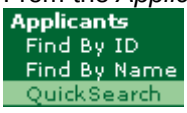
This chapter is for anyone who needs to get information from the iGreentree system. After completing this chapter, the User will be able to:

- Find data about Applicants, Requisitions, Applications, History, Sources, and Hiring Managers
- Find possible candidates for Requisitions
- Switch between different views and windows
- Update information

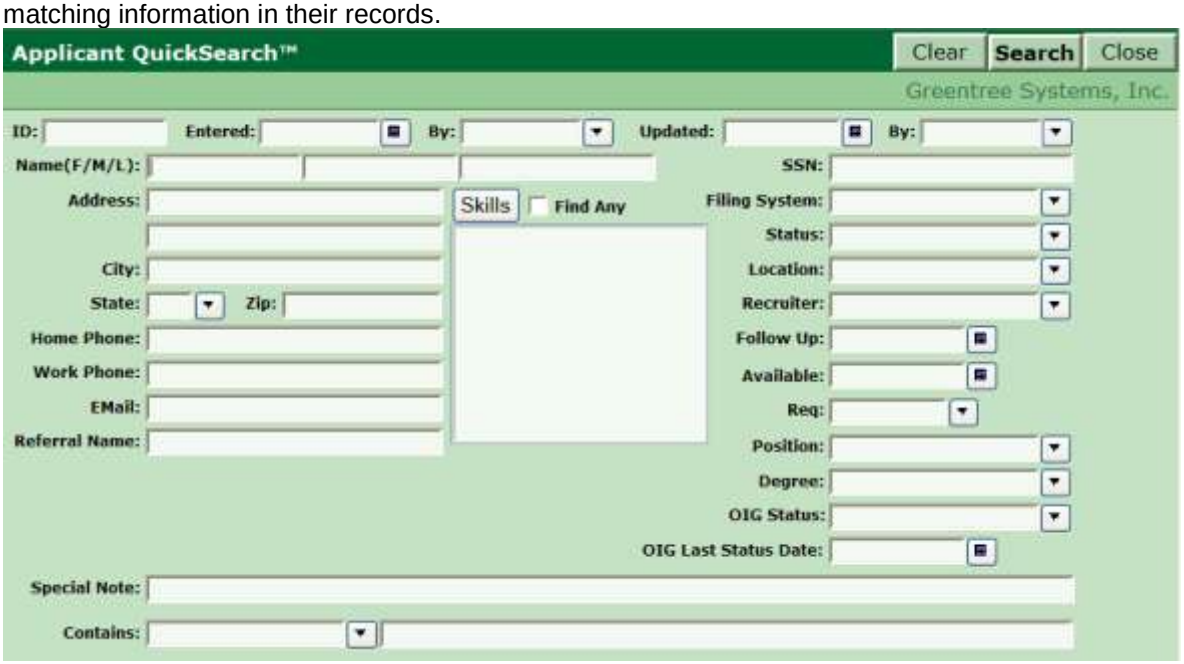
QuickSearch

The QuickSearch in iGreentree allows the User to enter data into one or more fields and search for records that match the same criteria. The QuickSearch form allows for searching of the base record as well as several of the History and Attachments.

From the *Applicants* menu, select *QuickSearch*.

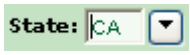


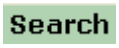
Enter criteria in any of the fields on this window, and click the **Search** button to find Applicants with matching information in their records.



Entering data in multiple fields will be treated as an "AND" search criteria. For example, if a Skill and a Degree are entered, only those Applicants who have both that Skill and that Degree will be found.

General Searching and Results

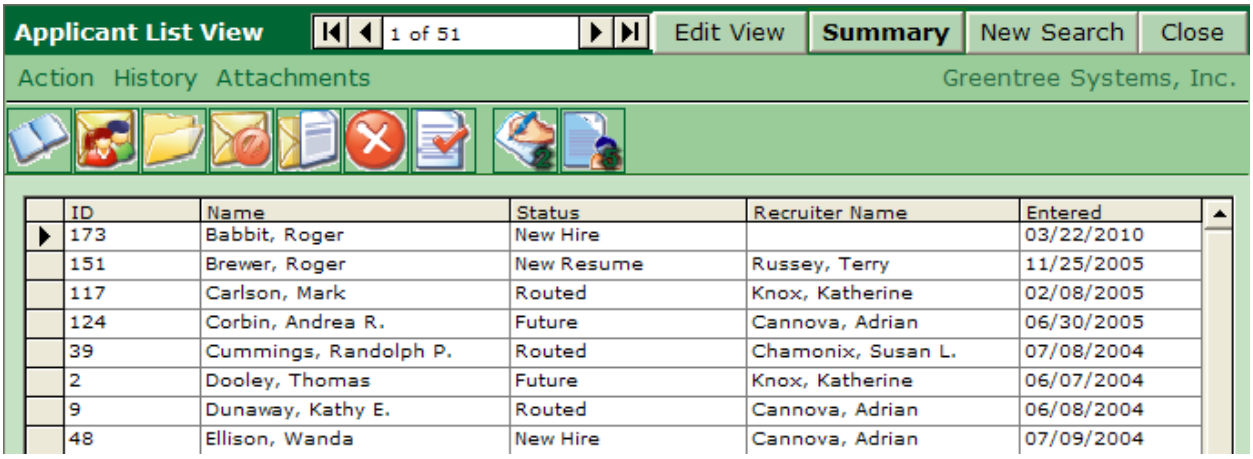
To find someone who lives in California, choose *CA* from the select list in the *State* field 

, then click the 

button (or *press the* Enter *key since the Search button is the default button that is highlighted).*

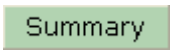
Data Display Views

When the search finds more than one record, a list of the matching records appears in what is called the *List View*:



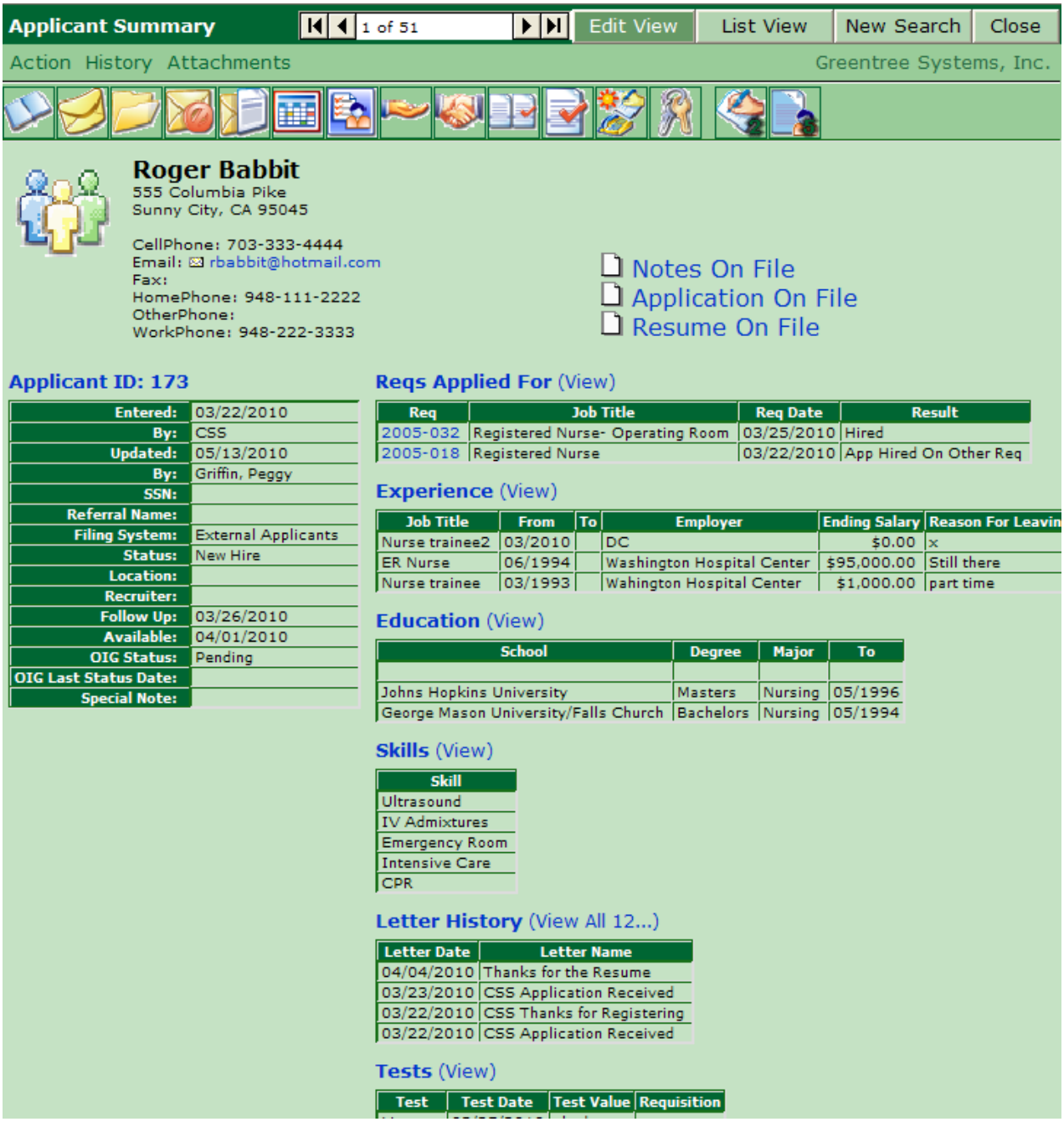
ID	Name	Status	Recruiter Name	Entered
173	Babbit, Roger	New Hire		03/22/2010
151	Brewer, Roger	New Resume	Russey, Terry	11/25/2005
117	Carlson, Mark	Routed	Knox, Katherine	02/08/2005
124	Corbin, Andrea R.	Future	Cannova, Adrian	06/30/2005
39	Cummings, Randolph P.	Routed	Chamonix, Susan L.	07/08/2004
2	Dooley, Thomas	Future	Knox, Katherine	06/07/2004
9	Dunaway, Kathy E.	Routed	Cannova, Adrian	06/08/2004
48	Ellison, Wanda	New Hire	Cannova, Adrian	07/09/2004

When an Applicant in the *List View* is selected, the User can click the 

or 

button to view more detailed information about the Applicant.




Applicant Summary
1 of 51
Edit View
List View
New Search
Close
Action History Attachments
Greentree Systems, Inc.
Roger Babbit
555 Columbia Pike
Sunny City, CA 95045
CellPhone: 703-333-4444
Email: rbabbit@hotmail.com
Fax:
HomePhone: 948-111-2222
OtherPhone:
WorkPhone: 948-222-3333
Notes On File
Application On File
Resume On File
Applicant ID: 173
Entered: 03/22/2010
By: CSS
Updated: 05/13/2010
By: Griffin, Peggy
SSN:
Referral Name:
Filing System: External Applicants
Status: New Hire
Location:
Recruiter:
Follow Up: 03/26/2010
Available: 04/01/2010
OIG Status: Pending
OIG Last Status Date:
Special Note:
Reqs Applied For (View)
Req | Job Title | Req Date | Result
2005-032 | Registered Nurse- Operating Room | 03/25/2010 | Hired
2005-018 | Registered Nurse | 03/22/2010 | App Hired On Other Req
Experience (View)
Job Title | From | To | Employer | Ending Salary | Reason For Leavin
Nurse trainee2 | 03/2010 | | DC | $0.00 | x
ER Nurse | 06/1994 | | Washington Hospital Center | $95,000.00 | Still there
Nurse trainee | 03/1993 | | Wahington Hospital Center | $1,000.00 | part time
Education (View)
School | Degree | Major | To
Johns Hopkins University | Masters | Nursing | 05/1996
George Mason University/Falls Church | Bachelors | Nursing | 05/1994
Skills (View)
Skill
Ultrasound
IV Admixtures
Emergency Room
Intensive Care
CPR
Letter History (View All 12...)
Letter Date | Letter Name
04/04/2010 | Thanks for the Resume
03/23/2010 | CSS Application Received
03/22/2010 | CSS Thanks for Registering
03/22/2010 | CSS Application Received
Tests (View)
Test | Test Date | Test Value | Requisition

Both *Edit* and *Summary View* contain the same information with the same *Actions, History* and *Attachments*. The User can decide which view they prefer to work in.

The Edit View, Summary and List View buttons can be used to move back and forth between one record and a condensed list of many records.

Creating a New Search

If the User wants to perform a new search he/she can click New Search. The User will be returned to the QuickSearch screen which will be populated with the most recent search criteria. The User can click Clear to remove the old criteria and start a new search.

Changing Data on a Record

Data can easily be changed on existing records in *Edit View*. The User must select the field to be updated by either clicking with the mouse on the field or using the *Tab* key on the keyboard.

If a text field is selected the User can overwrite the previous data by simply typing over it and clicking Save.

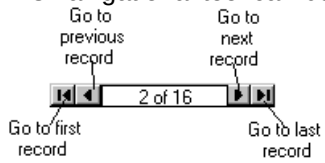
Address: 1234 Some Street

If changing a coded field or a date field the User must click the button or the button (respectively) and select the new code or date from the window. Once all changes are made, click Save.
Once data on a record is altered and saved, the *Updated* date and *By* field are automatically updated with the current date and User name of the person who made the change.

Updated: 01/26/2006 **By:** Muxlow, Kristina

Moving to Another Record

The User can navigate between records using the *Navigation Box* at the top of the search results window. This navigational tool can be used from either the *List View*, *Edit View* or *Summary View*.



Sorting the Record Results

When in the *List View* a User can sort by fields of data by simply clicking at the top of that column in the gray box where the name of the field is displayed. The column will be sorted in ascending order.

	ID	Name	Status	Recruiter Name	Entered
	1	Michaels, Lauren	Interview	Knox, Katherine	06/01/2004
	2	Dooley, Thomas	Future	Knox, Katherine	06/07/2004
	3	Gessinger, Harvey	Future	Knox, Katherine	06/07/2004
	4	Karne, Julie	New Hire	Cannova, Adrian	06/07/2004
	9	Dunaway, Kathy E.	Routed	Cannova, Adrian	06/08/2004

If the same column is sorted again it will sort in descending order.

	ID	Name	Status	Recruiter Name	Entered
▶	168	Que, Steven			01/26/2006
	165	Que, Suzy	New Hire		01/23/2006
	151	Brewer, Roger	New Resume	Russey, Terry	11/25/2005
	141	Watson, Eddie			11/02/2005
	140	Radish, Jennifer			11/01/2005
	125	Franklin, Marvin	Interview	Chamonix, Susan L.	07/04/2005
	122	Yen, Cheng-yeh	Future	Chamonix, Susan L.	06/30/2005

NOTE: Notice that when trying to sort by ID, it treats the ID numbers as alphanumeric text which sorts from left to right regardless of the number of digits (i.e. number 16 will appear before number 5). Therefore, sorting by Entered *is a better way to sort records in the order they came into the system.*

If the User sorts on a column where several records are missing that data, *the Applicants with blanks will appear at the top.*

	ID	Name	Status	Recruiter Name	Entered
▶	168	Que, Steven			01/26/2006
	165	Que, Suzy	New Hire		01/23/2006
	140	Radish, Jennifer			11/01/2005
	141	Watson, Eddie			11/02/2005
	124	Corbin, Andrea R.	Future	Cannova, Adrian	06/30/2005
	9	Dunaway, Kathy E.	Routed	Cannova, Adrian	06/08/2004

Delineating a Search

Often times a QuickSearch results may include records that are not needed. Instead of running a new search with more criteria, the User can delineate the search results so that unwanted records are removed. To eliminate specific records, click in the gray bar at the left of the record to be removed.

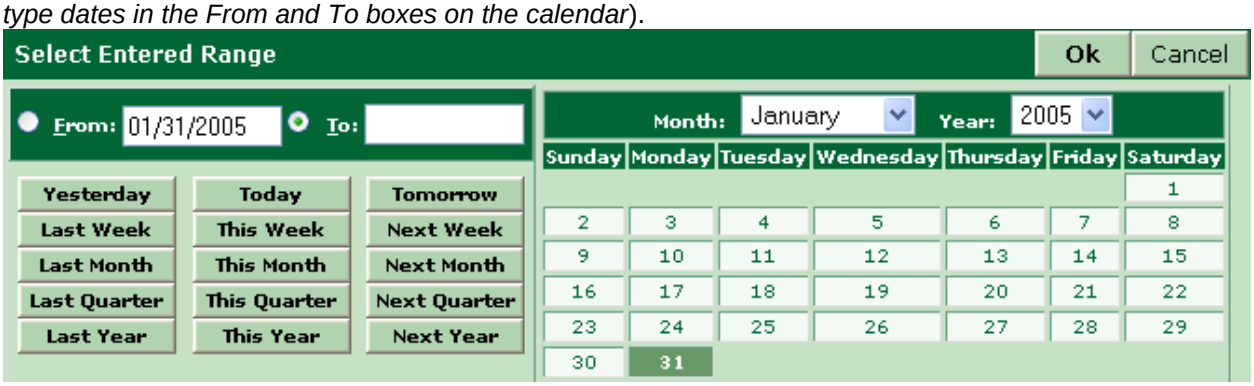
	ID	Name	Status	Recruiter Name	Entered
	168	Que, Steven			01/26/2006
▶	165	Que, Suzy	New Hire		01/23/2006
	140	Radish, Jennifer			11/01/2005

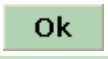
Press the *Delete* key on the keyboard to remove the highlighted record. *This will remove the record from the search, but not from the database. If the wrong record is removed from the search it can be retrieved by running the original search again.*

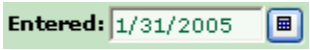
If there is a need to remove several records from a search result they must be selected and removed one record at a time. Repeat for each record that needs to be removed from this search.

Searching with Dates

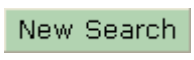
At the *Entered* field, use the  button to select a date (or date range). The current date is always highlighted in bold. Click on the date and it will be entered in the *From box (if preferred, Users can also type dates in the From and To boxes on the calendar*).

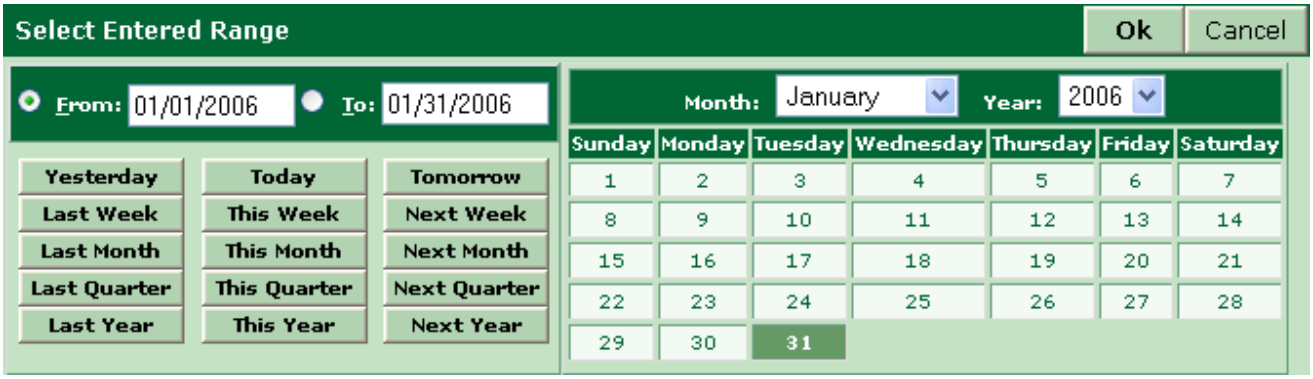

Select Entered Range
Ok
Cancel
From: 01/31/2005
To:
Month: January
Year: 2005
Sunday Monday Tuesday Wednesday Thursday Friday Saturday
1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30 31
Yesterday Today Tomorrow
Last Week This Week Next Week
Last Month This Month Next Month
Last Quarter This Quarter Next Quarter
Last Year This Year Next Year

Click  and the Entered Date on the QuickSearch screen will populate with the date.



Click  to perform the search. Only Applicants entered on that specific date will be returned.

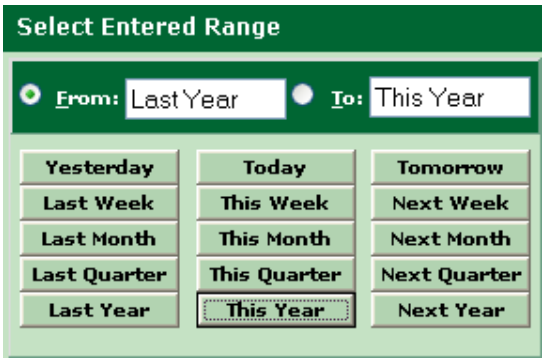
Select  and go back to the  button next to the *Entered* field. This time, select the first day of the current month (From) and then select the last day of the current month (To).



When Ok is chosen *Range* will display on the QuickSearch screen to represent that more than one date has been selected. Entered: Range

Click Search. The system finds Applicants who were entered any time during that period, including the date specified on the *From* and *To* date fields.

Select New Search and enter a Relative date onto the *Entered* field. Choose *Last Year* for the *From*, then choose *This Year* for *To*.



When Ok is chosen Entered: Range will display on the QuickSearch screen to represent that more than one date has been selected. *Relative dates are always based on the normal calendar. The system does not know anything about fiscal dates. Relative dates are also inclusive, so this search would find anything entered from January 1 of the previous year, all the way through December 31 of the current year.*

Searching with Text Fields

Text fields can be searched by typing the text to be found into the field to be searched.

Start a new Applicant QuickSearch by choosing New Search.

Try searching for Applicants in a particular city and click Search to see if any Applicants are found.

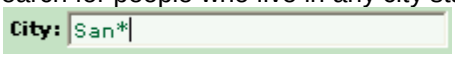
City: Any City

TIP: Case is not important when entering criteria, but spacing is.

This works great when the User knows the exact spelling. However, there is a tool for Users who do not have the exact spelling. They can use a Wildcard search.

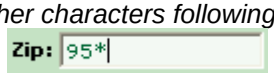
Wildcard Searches

Wildcard searches can be performed on any Text field to assist the User with finding records that contain a particular string of known characters followed by one or more unknown characters. *The asterisk (*) is the wildcard symbol that represents the unknown characters.*

To search for people who live in any city starting with the letters *San* the User can type an asterisk after *San* 

and then click Search.

This search finds people whose city starts with the letters San and any other characters following.

The User can also find people with a zip code starting with 95 by entering 

and Search.

To find people who currently work in education, try: 

The wildcard (*) can go at the start or end of the field, or even both ends. For example, if the User knows the word Part-Time was entered onto the Special Notes *field, but not whether or not there were words before or after it, he/she could enter:*



Applicant Searches

Searching for Applicants is important for any recruiter and there are many ways to find Applicants in iGreentree.

Searching by Applicant Name

Recruiters often want to find people by name and there is a special option from the main menu just for this purpose. Under *Applicants,* choose *Find by Name.*

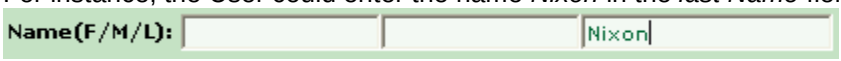


NOTE: Searching by *name can also be performed from the Applicant QuickSearch window.*

Phonetic Name Search

Often the recruiter may not know the exact spelling of an Applicant's name so name searches have a special feature that performs a phonetic name search. *The system will use Phonetic searching for last names if a wildcard (*) is NOT included*.

For instance, the User could enter the name *Nixon* in the *last Name* field.



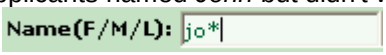
When he/she selects the Search button the search will look for Applicants whose last name Sounds Like *Nixon.*

	ID	Name	Status	Recruiter Name	Entered
▶	116	Nickson, Troy	Routed	Knox, Katherine	01/27/2005
	15	Nixon, Karen	Future	Cannova, Adrian	06/10/2004
	121	Nixon, Teri	Future	Chamonix, Susan L.	06/09/2005

Case is not important when entering criteria, but spacing is. The system finds last names that start with N and the next 3 consonant sounds like XN.

Character Name Search

If the User knows the exact name, they can enter it and click Search.

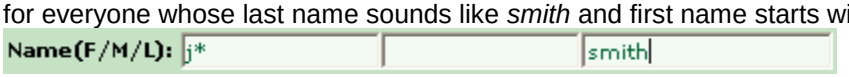
However, suppose the User wanted to find Applicants named *John* but didn't want to miss anyone with *Jonathan* or *Johnny.* They might try entering 

to find all names *that start with "jo". It is important to note that names like Joe and Joan will also be found, but variations of John would not be missed.*

	ID	Name	Status	Recruiter Name	Entered
▶	23	Ammerman, John	Future	Knox, Katherine	06/20/2004
	500006	Cook, Joanne	Future	Chamonix, Susan L.	08/07/2005
	57	Henderson, Jonathon		Knox, Katherine	07/14/2004

Combining Phonetic and Character search

Combinations of phonetic and character searches can be performed. For instance, the User can search for everyone whose last name sounds like *smith* and first name starts with *J.*



	ID	Name	Status	Recruiter Name	Entered
▶	134	Smith, John	Future	Chamonix, Susan L.	08/05/2005
	60	Smith, John	Future	Mercer, Michael M.	07/27/2004
	135	Smitt, June		Chamonix, Susan L.	08/05/2005
	136	Smythe, John M.		Knox, Katherine	08/06/2005

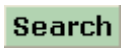
If a wildcard is being utilized in a name field the phonetic search will NOT be performed for that field. For instance, if in the above example "jo*" had been entered in the *First Name* field, June Smitt's record would not have been returned.

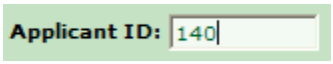
Searching by ID Number

The fastest way to find an exact record is to search by the unique ID number. For all other fields searched several records may have the same data. If the ID number is known it is one of the fields that is a unique identifier and one every Applicant is guaranteed to have.

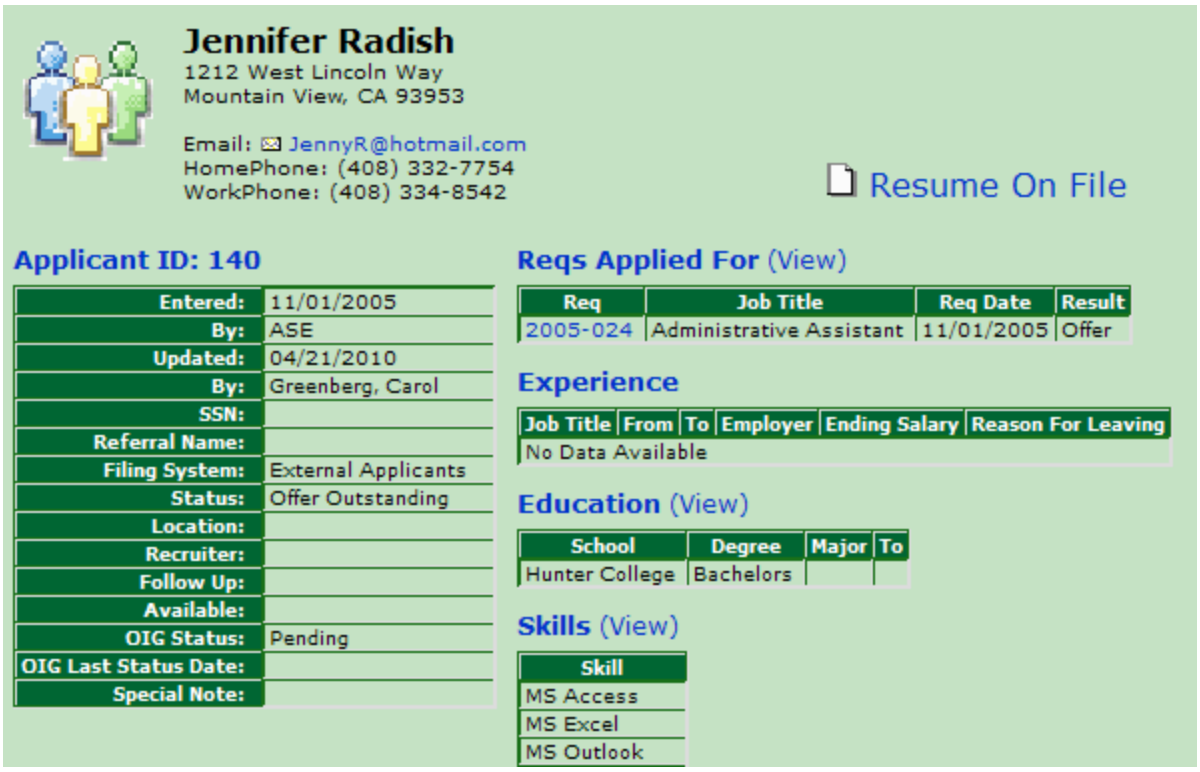
To perform a search by ID number, choose *Find By ID* from the *Applicants* menu.



Enter the ID number and 



When *Searching* by a specific ID number, the system will go directly to the *Summary View* for that Applicant, if designated in your User Preferences.



Jennifer Radish
1212 West Lincoln Way
Mountain View, CA 93953

Email: JennyR@hotmail.com
HomePhone: (408) 332-7754
WorkPhone: (408) 334-8542

Resume On File

Applicant ID: 140

Entered:	11/01/2005
By:	ASE
Updated:	04/21/2010
By:	Greenberg, Carol
SSN:	
Referral Name:	
Filing System:	External Applicants
Status:	Offer Outstanding
Location:	
Recruiter:	
Follow Up:	
Available:	
OIG Status:	Pending
OIG Last Status Date:	
Special Note:	

Reqs Applied For (View)

Req	Job Title	Req Date	Result
2005-024	Administrative Assistant	11/01/2005	Offer

Experience

Job Title	From	To	Employer	Ending Salary	Reason For Leaving
No Data Available					

Education (View)

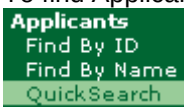
School	Degree	Major	To
Hunter College	Bachelors		

Skills (View)

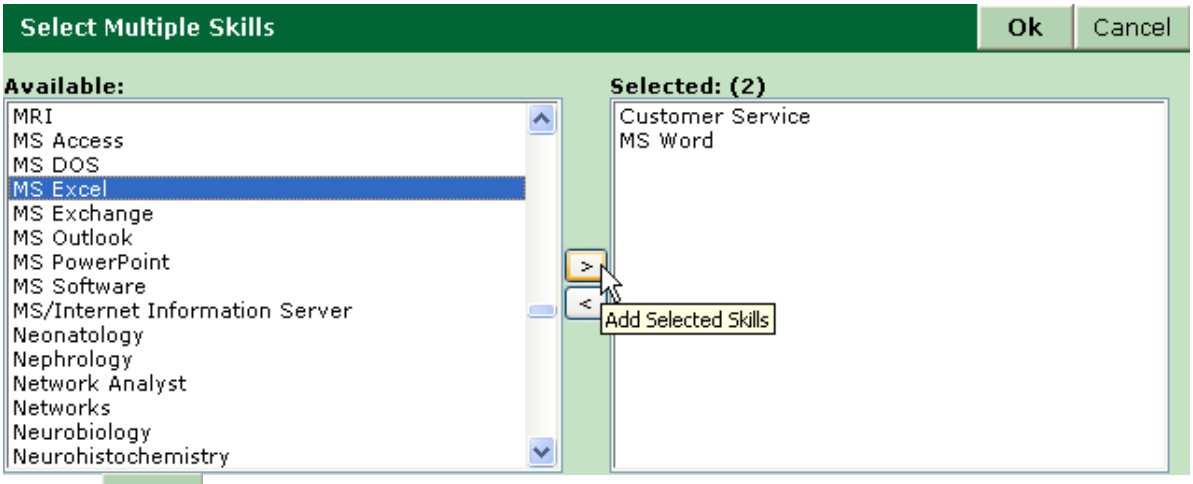
Skill
MS Access
MS Excel
MS Outlook

Searching Attachments

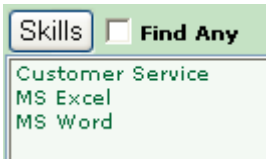
Many Attachments can be searched via the QuickSearch screen. Skills Attachment is a common Attachment used to search for Applicants. Therefore, Skills have been added to the QuickSearch screen. To find Applicants, who have a *Customer Service* skill, return to *Applicant QuickSearch*:



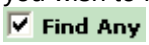
Click the Skills button to view a list of available skills, use the > button to move the highlighted skill from the *Available* column to the *Selected* column.



Choose Ok to return to the *QuickSearch* screen, the skills selected are now listed in the *Skills* box.

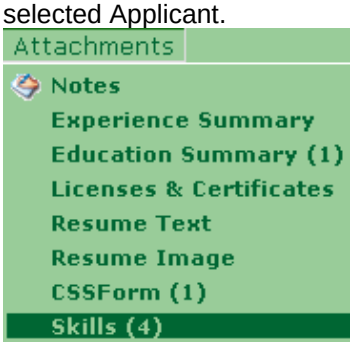


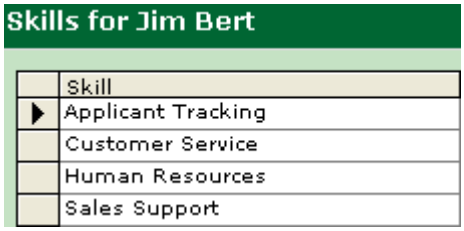
Performing the search now will return a list of Applicants who have all three Skills associated with them, if you wish to find Applicants that have any one of the three skills chosen, click on the box next to *Find Any.*



This will return a list of Applicants that have any one of the three skills selected.

While in *List View*, the User can select *Skills* from the Attachments menu to look at the skills for the selected Applicant.





Because they are also used frequently for Applicant searching, the Req, Position and Degree fields are also on the Applicant QuickSearch screen.

Contains Searches

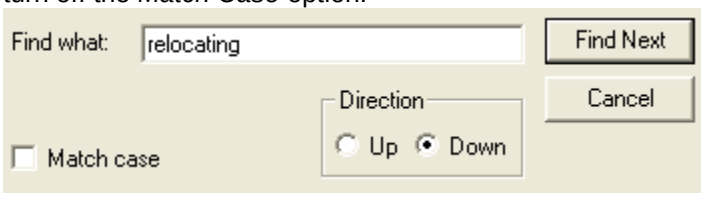
To search for specific data within other attachments, use the *Contains* field. *The Contains search utilizes Microsoft's Text Search engine. It is powerful, but can be slow since it is searching large text files. It is usually more efficient to search on codes (such as Skills or Degrees). Case does not matter in a Contains search.*

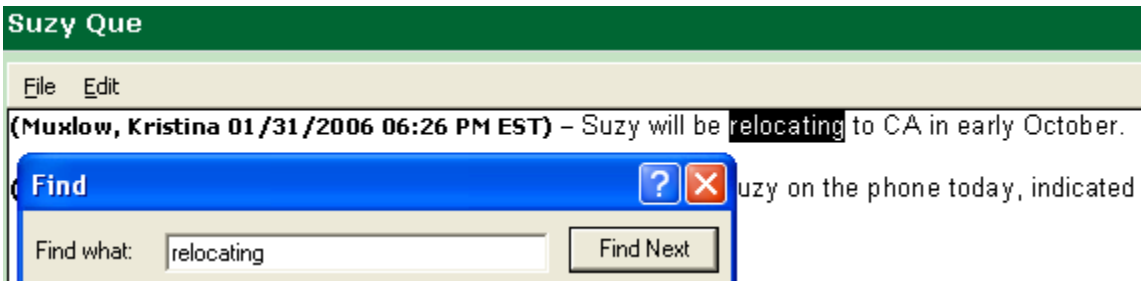
To find Applicants who have Notes containing the word *relocating* the User would enter:



	ID	Name	Status	Recruiter Name	Entered
	168	Que, Steven			01/26/2006
	165	Que, Suzy	New Hire		01/23/2006
	43	Barth, Sharon	Routed	Cannova, Adrian	07/08/2004
	79	Boswell, Stephen T.	Routed	Mercer, Michael M.	08/07/2004

Once some records are found, Users can see where in the notes that word was found. Under Attachments, select Notes. Open *Find* from the *Edit* menu within the *Notes* window, but don't forget to turn off the *Match Case* option.

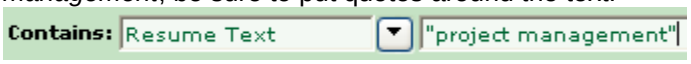




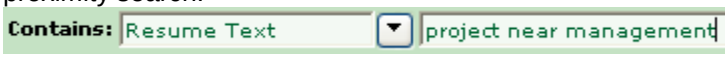
To find Applicants whose Notes contain either *relocating* or *relocate*, use a Wildcard *, but also put quotes around the text. *Microsoft calls this a Prefix. It only works when the asterisk is at the end of a word.*



To find Applicants whose Resume Text Attachments contain a specific phrase, such as *project management*, be sure to put quotes around the text.



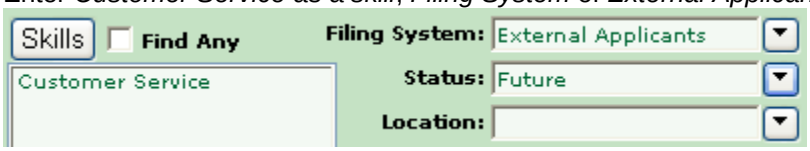
To find Applicants who have Resume Text with the word *Project* close to the word *Management*, use a proximity search.



Searching with Multiple Criteria

QuickSearches can be performed on multiple criteria entered into many different fields. *Entering data in multiple fields is treated as "AND" search criteria, therefore an Applicant must meet all the criteria identified in order to be returned in the search results.*

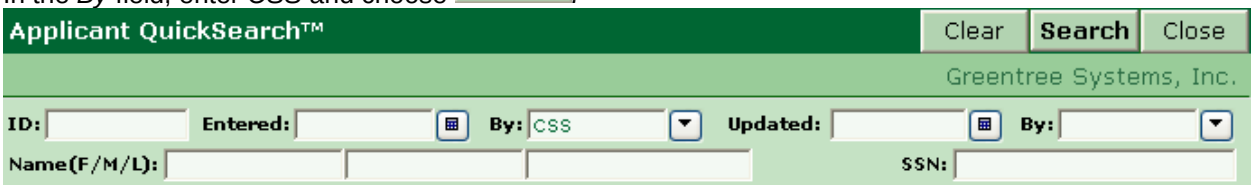
Enter *Customer Service* as a *skill*, *Filing System* of *External Applicants* and *Status* of *Future*:



Searching for CSS Applicants

Applicants may be entering the system via the Candidate Self-Service module.

In the *By* field, enter *CSS* and choose **Search**.

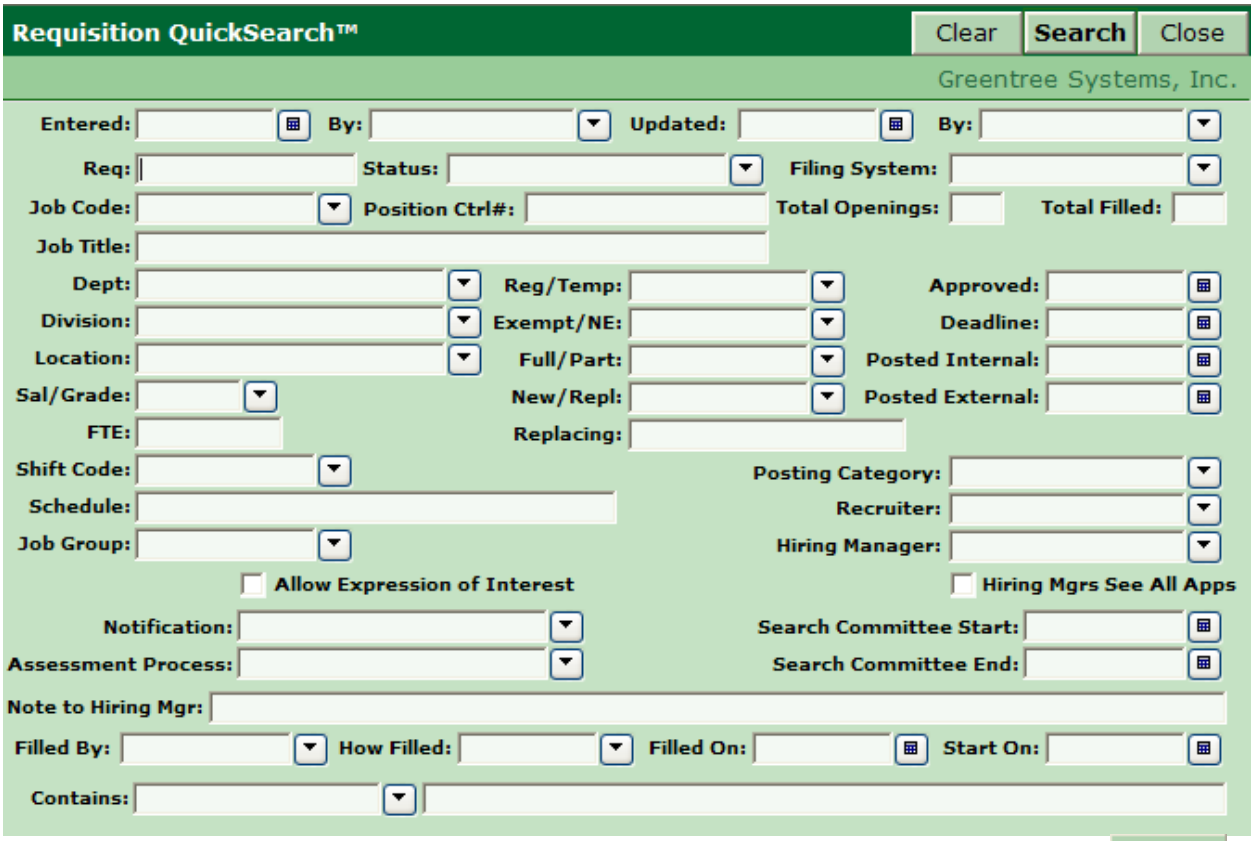


NOTE: This will only find Applicants who were first entered by CSS. If an Applicant first came into the system by the Automated Resume Processor they would have ARP on the *By* field even if an Application has since been added. For more on CSS, see the Candidate Self-Service Chapter.

Requisition Searches

Select *QuickSearch* from the *Requisition* menu. Simply entering criteria into this screen can perform the majority of Requisition searching.





To find Requisitions that are currently *Open,* select *Open* from the list of status codes. Select **Search** to run the search and be presented with Requisitions which have an *Open* status.

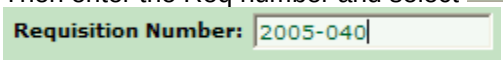
	Req	JobTitle	Status	Entered
▶	2004-003	Programmer/Analyst	Open	11/11/2004
	2004-004	Project Engineer	Open	11/11/2004
	2005-001	Software Development Manager	Open	1/12/2005
	2005-002	Design Engineer	Open	2/16/2005

Req Number Search

First choose *Find By Req#* from the *Requisitions* menu.



Then enter the Req number and select **Search**.



When a Req Number Search is completed the system will go directly to either the *Req Summary View* or *Edit View* (depending on the preferences selected) for the designated Requisition.



NOTE: Searching by *Requisition Number can also be performed from the Requisition QuickSearch window.*

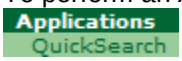
Requisition Searches by Hiring Managers

The Hiring Manager Module allows managers to find/review their own Reqs. See *Chapter 2* entitled *Requisition Management – Hiring Manager Module* for more information.

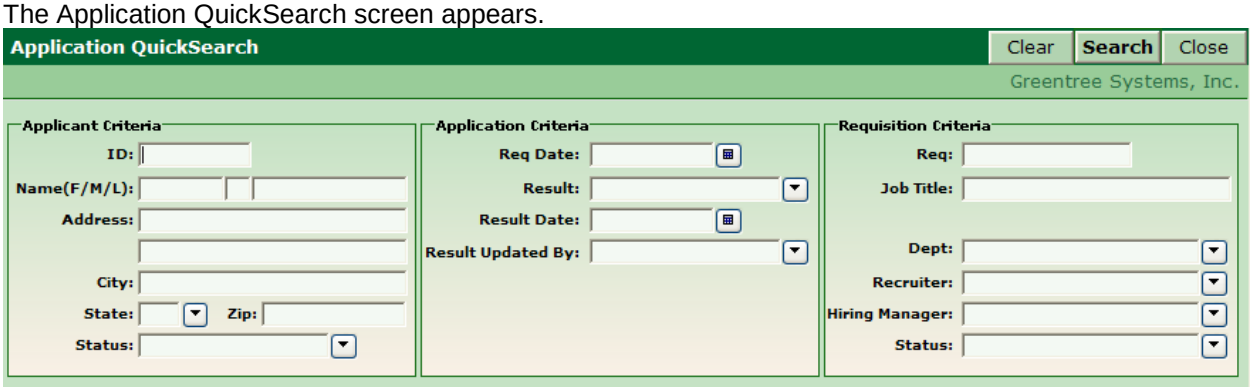
Application Searches

The Application QuickSearch allows the User to quickly look up and review Applications based on key information such as the Applicant's name or the job Requisition number. The result is all Applications that meet the criteria.

To perform an Application QuickSearch, select *QuickSearch* from the *Applications* menu.



The Application QuickSearch screen appears.

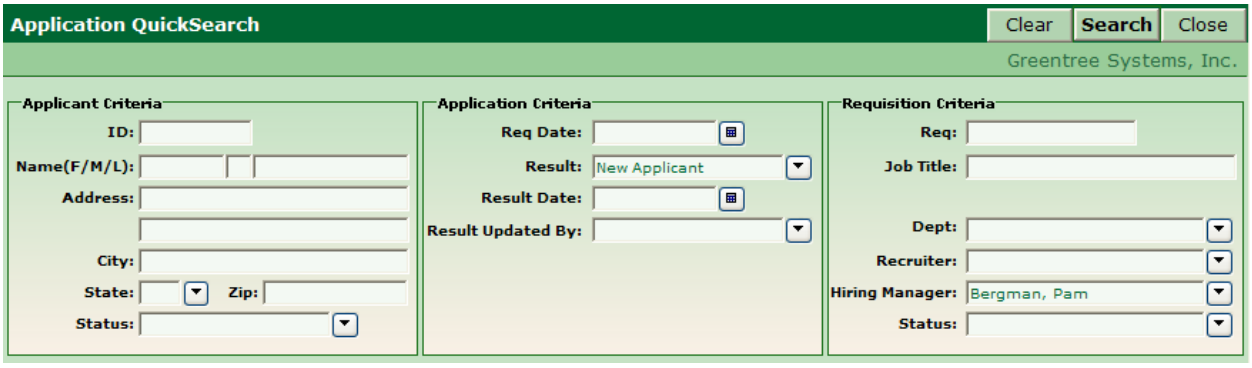


The most common Application QuickSearches are typically for:

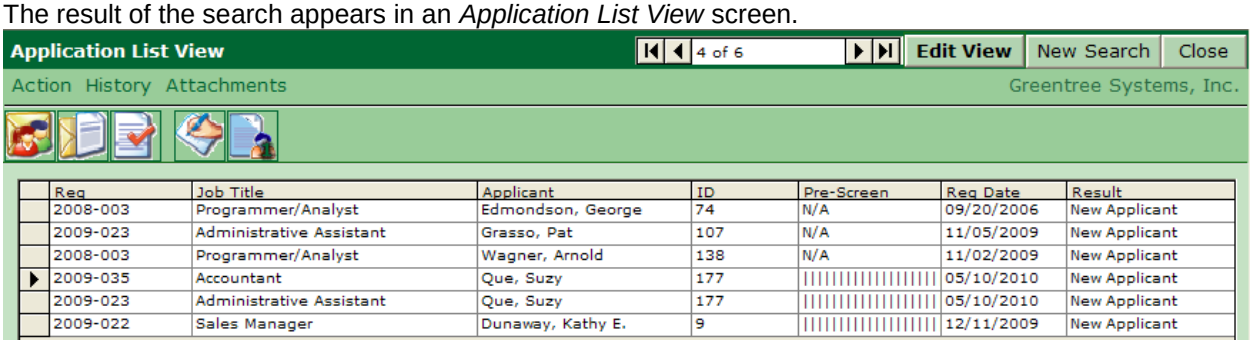
- all the Applications for a specific Requisition
- all the Applications for Requisitions assigned to a particular Recruiter
- all the Applications for Requisitions that belong to a Hiring Manager
- all the Applications made by an Applicant for any job
- all new Applications for a specific Requisition
- all the Applications by Applicants that have been marked with a status of *Future*

For example, in order to search for all new Applications for Requisitions that belong to a specific Hiring Manager the User would select the Application Result code of *New Applicant* and select the specific Hiring Manager under *Requisition Criteria,* as shown below, then click the 

button.

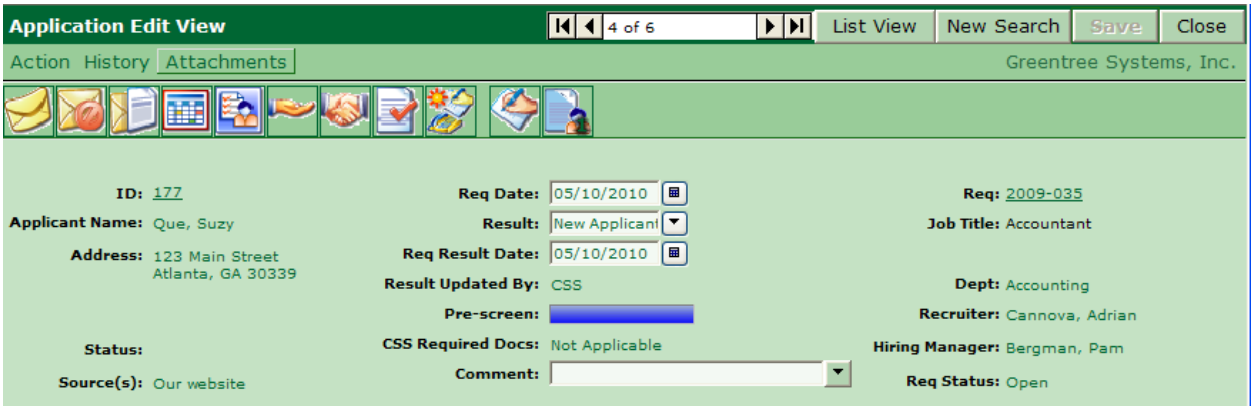


The result of the search appears in an *Application List View* screen.

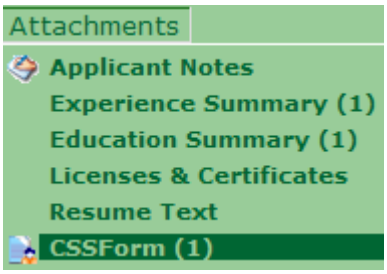


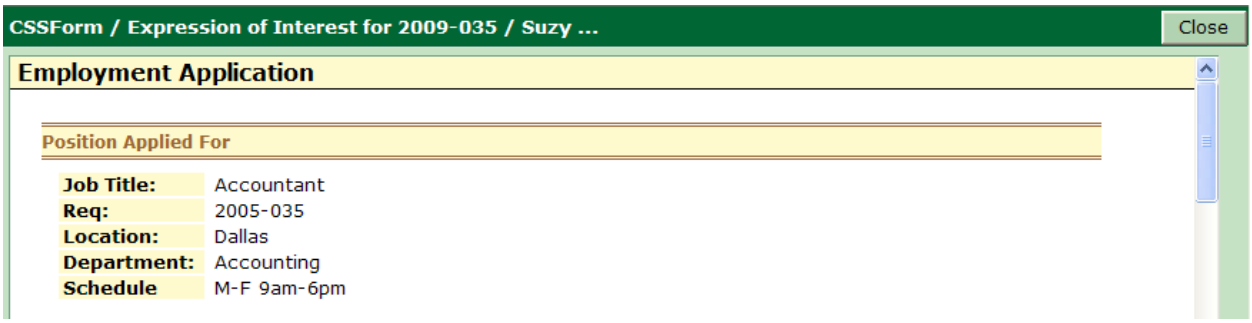
Req	Job Title	Applicant	ID	Pre-Screen	Req Date	Result
2008-003	Programmer/Analyst	Edmondson, George	74	N/A	09/20/2006	New Applicant
2009-023	Administrative Assistant	Grasso, Pat	107	N/A	11/05/2009	New Applicant
2008-003	Programmer/Analyst	Wagner, Arnold	138	N/A	11/02/2009	New Applicant
2009-035	Accountant	Que, Suzy	177		05/10/2010	New Applicant
2009-023	Administrative Assistant	Que, Suzy	177		05/10/2010	New Applicant
2009-022	Sales Manager	Dunaway, Kathy E.	9		12/11/2009	New Applicant

From this Application List View the User has quick access to information about new Applications. To quickly review an Application, click on the line associated with the desired Application then click on **Edit View**. The Application Edit View screen appears.



From here, the User can review the Applicant's Application form by selecting *CSSForm* on the *Attachments* menu.





The User can also review the Applicant's resume, summary of education and experience and any licenses or certificates they possess by selecting the corresponding menu item under *Attachments*.

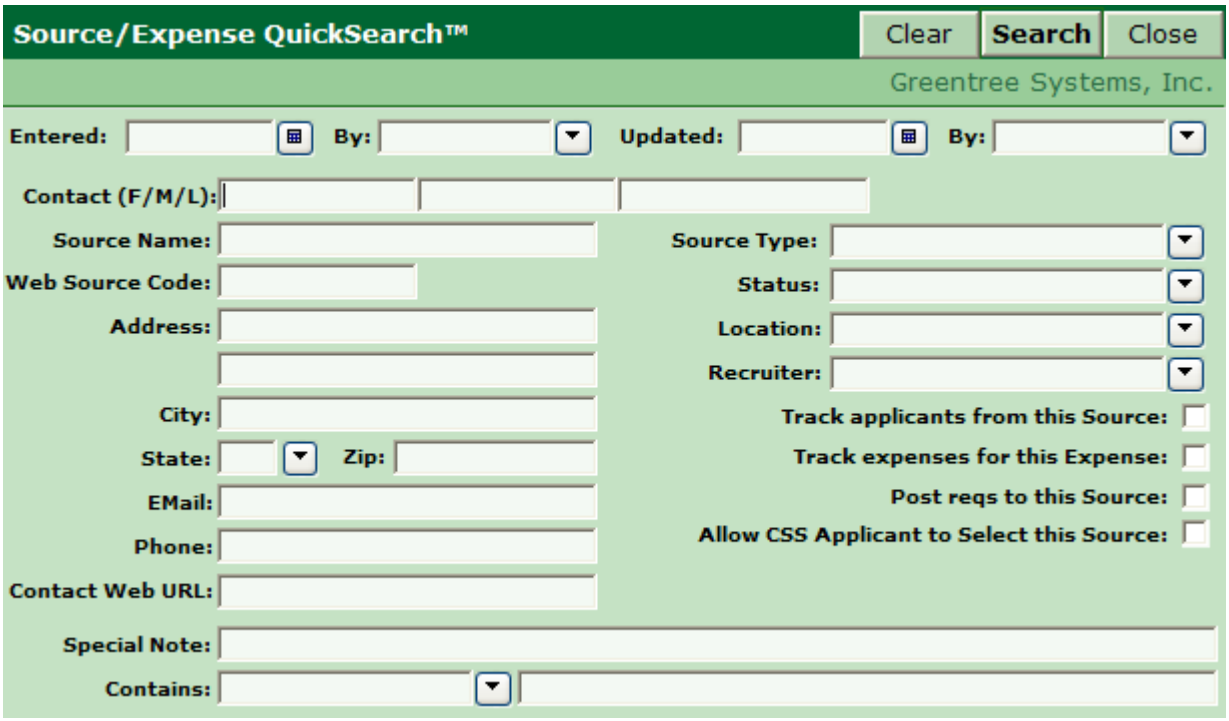
Once the Application is reviewed, the Application Result can be changed and saved from this same screen.

For more information on working with Applications, please refer to *Applications in iGreentree* in the *Requisition Management* chapter.

Source/Expense Searches

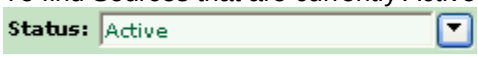
QuickSearches can be performed for Source and/or Expense records. Select *QuickSearch* from the *Sources/Expenses* menu.





Entering criteria into this window can perform most Source and/or Expense searching. Enter criteria in any of the fields on this window, and then choose **Search** to find records with that information in the selected fields.

To find Sources that are currently *Active*, select *Active* from the list of status codes.



then click **Search**.

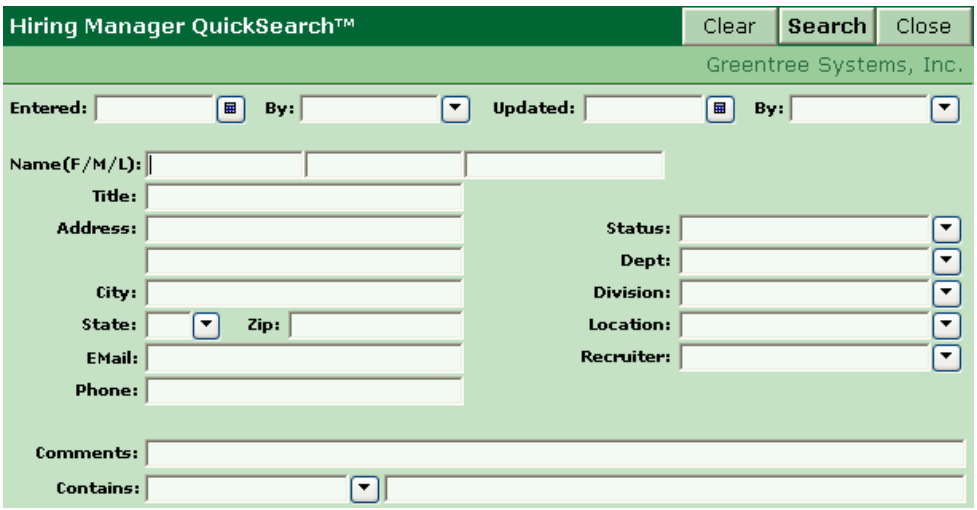
	Source Name	Type	Status	Contact	Location
▶	Our Website	Internet	Active	Durkin, John	Dallas
	AJB		Active	,	Atlanta
	Brass Ring	Job Fair	Active	Chisholm, Lou	Atlanta
	BrassRing.com		Active	,	Atlanta

Hiring Manager Searches

QuickSearches can be performed for Hiring Manager records.

Select *QuickSearch* from the *Hiring Mgrs* menu.





Most searching for Hiring Managers can be performed by simply entering criteria in this window. Enter criteria in any of the fields on this window, and then choose **Search** to find records with that information in the selected fields.

To find Hiring Managers who are currently *Active*: pull down the list of status codes and select *Active*



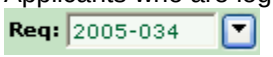
then click **Search**.

	Name	Title	Location	Status
▶	Bergman, Pam	Systems Development Manager	Atlanta	Active
	Elliott, Michael	Director of Human Resources	Atlanta	Active
	Greenberg, Carol	Financial Systems Supervisor	Atlanta	Active
	Griffin, Terry	Vice President, Operations	Atlanta	Active
	Johnson, Hugh	Manager, Sales and Marketing	Atlanta	Active

Searching for Applicants Logged to a Requisition

There are several ways to find Applicants who are logged to a particular Requisition:

- Perform an *Applicant QuickSearch* with a Req number in the *Req* field. This search will find all Applicants who are logged to the selected Req.

- Perform a *Requisition QuickSearch* to find that particular Requisition, then choose *Applicants* from the *History* menu or click on the *Applicants (View)* quick link heading (in blue). From there choose *View App* to select a particular Applicant. The search results will include Applicants logged to the Req and also gives information about the results from that logging.

  or

- Perform a *Requisition QuickSearch* to find that particular Requisition, then use the *Find Matching Apps* Action. This option finds people who may or may not already be logged to the Req, but do meet the Qualifications (Skills, Degrees, etc.) that were specified in Search Criteria.

  NOTE: See the "Requisition Management" chapter for more information about Search Criteria and Find Matching Apps.

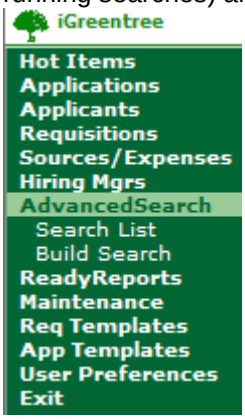
Advanced Searching

AdvancedSearch provides searching capabilities beyond what can be completed with a QuickSearch. These additional capabilities include:

- Naming and saving searches
- Designating searches Public (shared) or Private
- Searching on Attachments and History items such as Routes, Interviews, etc.
- Searching on null and non-null values
- Selectable field conditions (=, <, > etc)
- Boolean search logic (And/Or/Or Not) using nested search criteria (grouping)
- Parameter prompting with settable defaults
- 'Copy to New' feature for creating a new search from an existing one
- 'Run at Startup' feature for creating 'Hot Items' search for each User

An AdvancedSearch can return any one of seven types of search results: Applicants, Applications, Requisitions, Hiring Managers, Sources, App Templates, or Req Templates. The functionality available for operating on search results is the same as that available after running a QuickSearch: run Actions, retrieve History, and/or review Attachments.

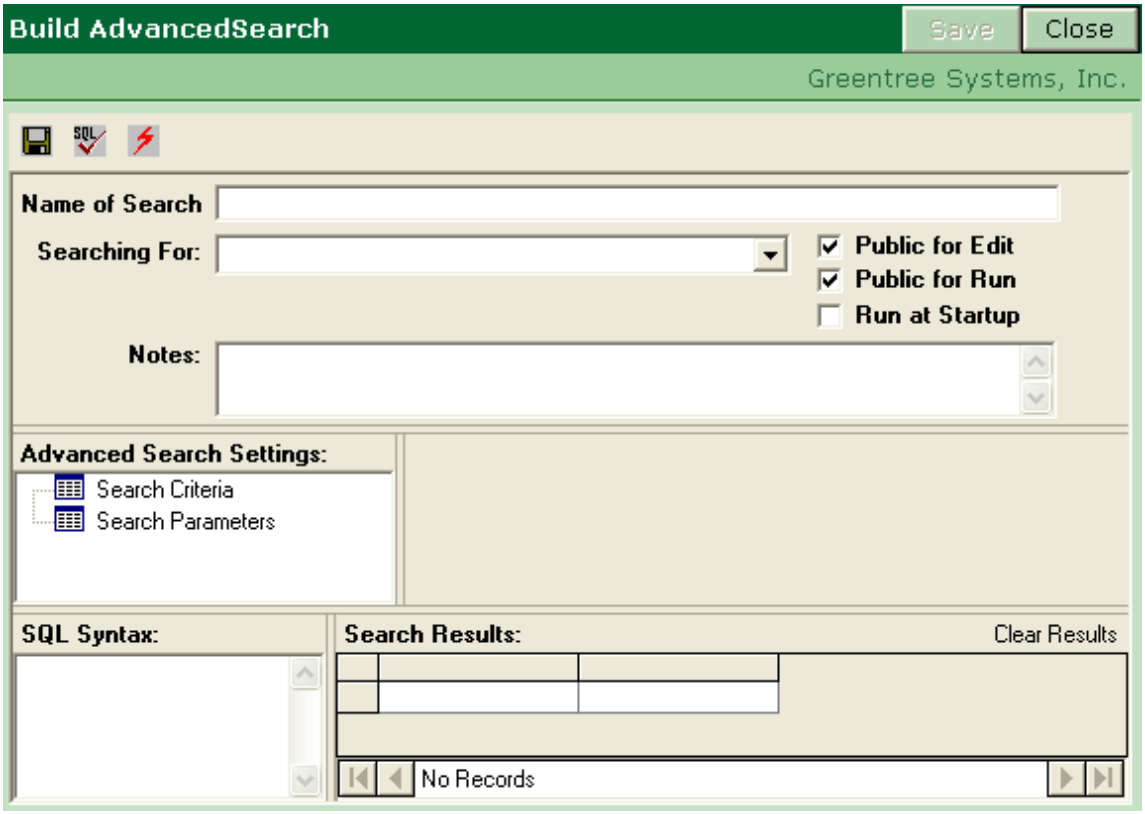
AdvancedSearch is listed under the main menu. It has two sub-menu selections named Search List (for running searches) and Build Search (for editing, adding, and deleting searches).



Search List and Build Search are menu-securable in Security Manager.

Building a Search

Begin by selecting Build Search. The Build AdvancedSearch form appears with a list of the existing advanced searches. Choose the  button to go to the Build Search page.



The sections of the Build AdvancedSearch page are as follows:

Name of Search: this will be the name of the search as it appears on the Search List page.

Searching For: must be one of Applicants, Applications, Requisitions, Sources, Hiring Managers, App Templates, or Req Templates.

Public for Edit: checking this box means any User with access to Build Search can edit the search. If unchecked, only the User who created the search will be able to edit it.

Public for Run: checking this box allows all iGT Users with access to Search List to run the saved search. If unchecked, only the User who created the search will be able to run it (the search will not appear on other Users' Search List page).

Run at Startup: checking this box tells iGreentree to use this search as the logged User's 'Hot Items' search (This search must NOT be 'Public for Edit' NOR 'Public for Run'). This search will run automatically when the User logs into iGreentree, and when the User selects Hot Items/Run from the main menu. If a User marks more than one AdvancedSearch as 'Run at Startup', iGreentree will select the first one it finds for that User.

Notes: any notes entered here will appear in the lower section of the Search List page when the search is highlighted on the list of searches.

AdvancedSearch Settings: this section allows the User to add/edit/delete search criteria, groups, and search parameters.

SQL Syntax: as AdvancedSearches are created, this section will display a logical facsimile, or pseudo-representation, of the SQL (Standard Query Language) code which will be generated by the search. This is intended as a diagnostic tool – or 'logic check' - to help debug searches.

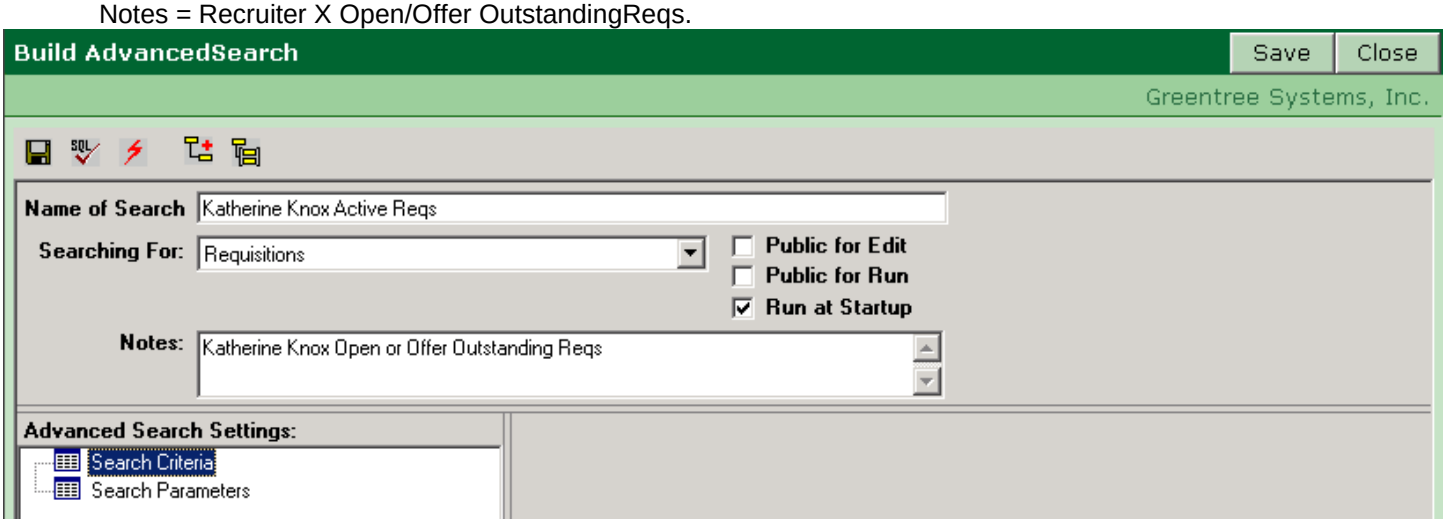
A Sample Advanced Search

For a sample AdvancedSearch, build one called 'Recruiter X Active Reqs' (where Recruiter X is an active Recruiter in your system) to use as a 'Hot Items' search. Search results should include the following reqs:

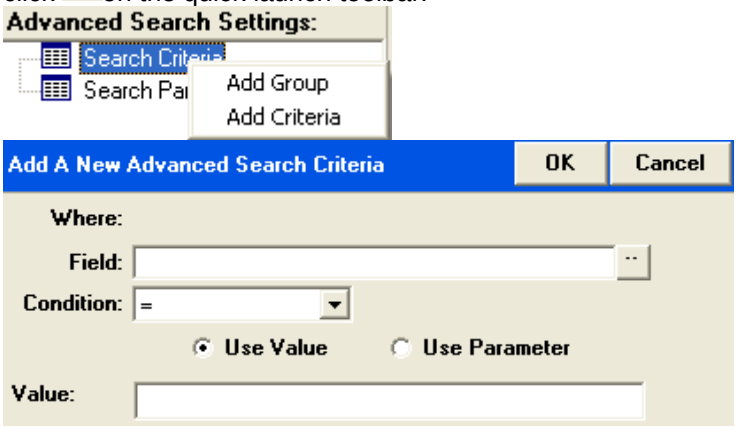
Reqs with ReqStatus = Open or ReqStatus = Offer Outstanding
Reqs with Recruiter = Recruiter X

Begin by entering the following in Build Search:

Name of Search = Recruiter X Active Reqs
Search For = Requisitions
Public for Edit = unchecked
Public for Run = unchecked
Run at Startup = checked
Notes = Recruiter X Open/Offer OutstandingReqs.

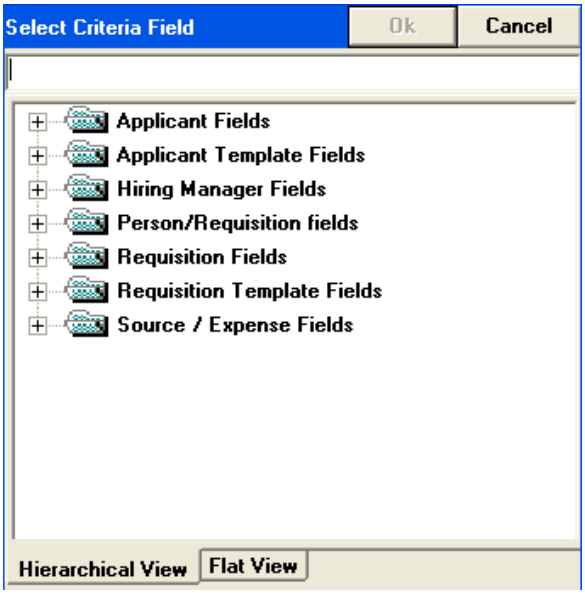


To add search criteria, right-click on 'Search Criteria' and select Add Criteria from the right-click menu or click  on the quick launch toolbar.



This dialog lets the User select a field, condition, and either a value or a parameter. For instance, one example would be ReqStatus = Open. Another example would be ReqDateFilled = Last Month.

To add search criteria, first click on the  button next to Field to view the Select Criteria Field dialog:



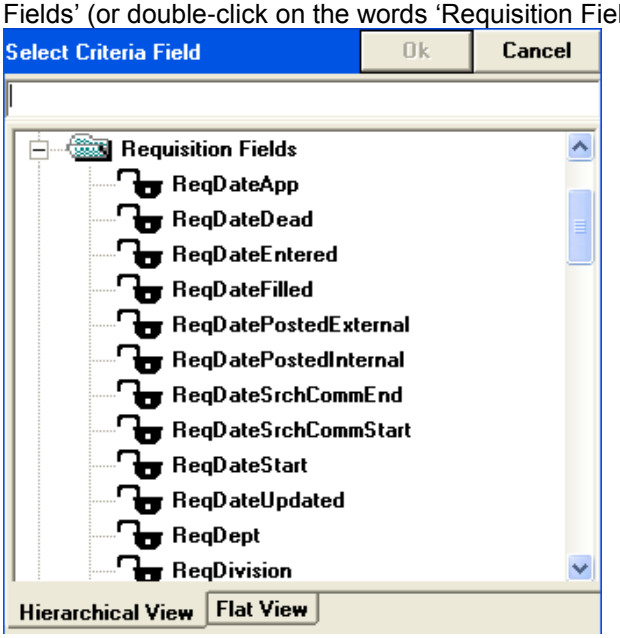
Notice the tabs at the bottom of this dialog labeled 'Hierarchical View' and 'Flat View'. These tabs provide two ways to view the same list of fieldnames:

Hierarchical View groups the fields by type: Applicants, Requisitions, etc. (Note that 'Person/Requisition Fields' are fields that contain information relating the Applicants to logged Requisitions.)

Flat View lists the fields in one large alphabetic list.

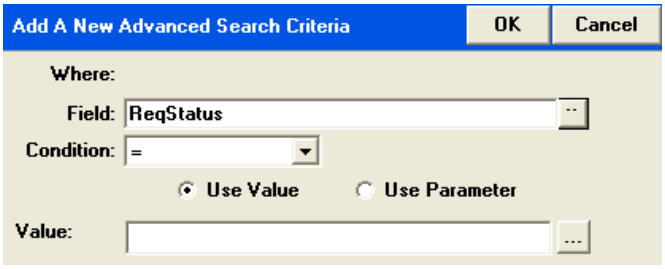
NOTE: AdvancedSearch provides 650+ fieldnames that can be used for searching.

To select the ReqStatus field using the default Hierarchical View, click on the '+' next to 'Requisition Fields' (or double-click on the words 'Requisition Fields') to expand that section:

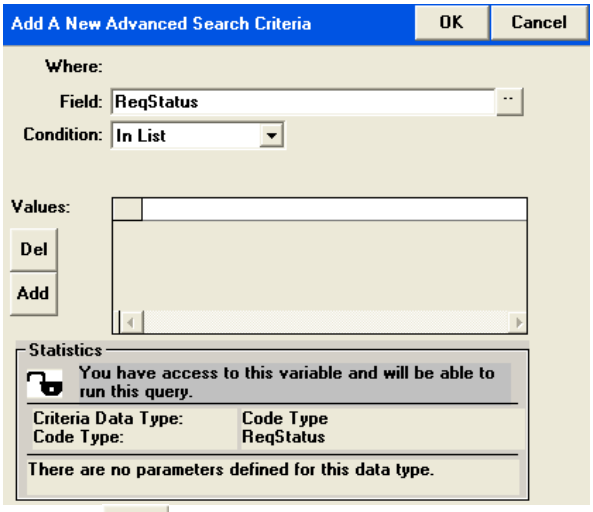


NOTE: The 'open padlock' graphic indicates that the User has security access to this field in Security Manager's row security settings. A 'closed padlock' would indicate that the User does not. Regardless of the access the field can still be used for creating and executing the search.

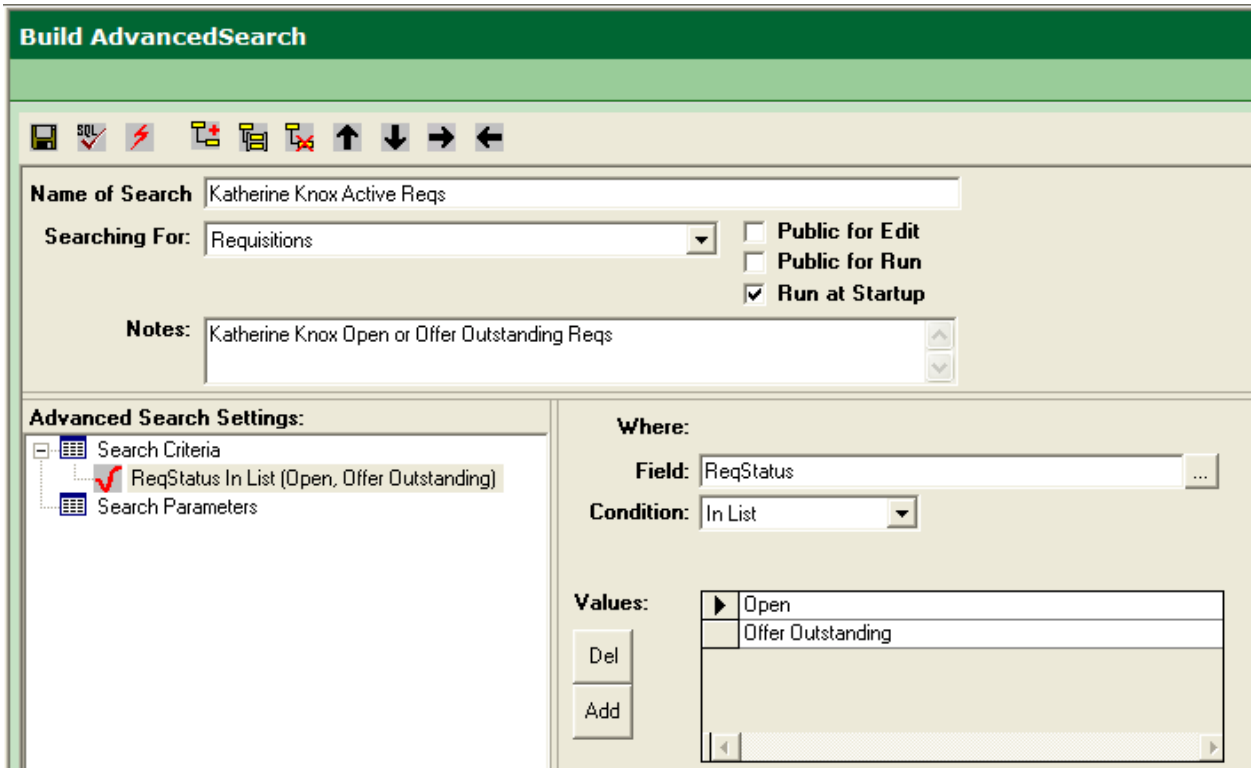
Scroll down and select ReqStatus from the list under *Requisition Fields* and click Ok; the User will be returned to the *Add A New Advanced Search Criteria* dialog.



The default Condition is set to '='. At this point the User can click on the button next to Value and select a specific value, such as Open, from the list of ReqStatus codes. However, in this example we want to include Requisitions which are either Open or Offer Outstanding, so instead of '=', select the Condition of 'In List':

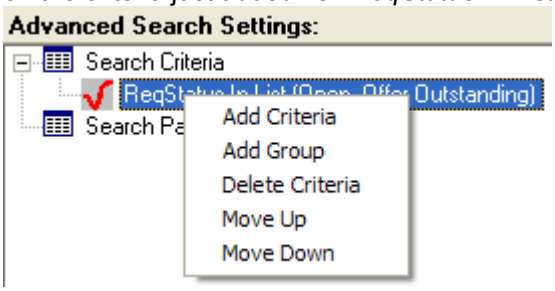


Use the Add button to select the ReqStatus codes to be included in the search criteria, and click Ok to add the selection(s), click OK again to add the search criteria to the search and return to the *Build AdvancedSearch* page:

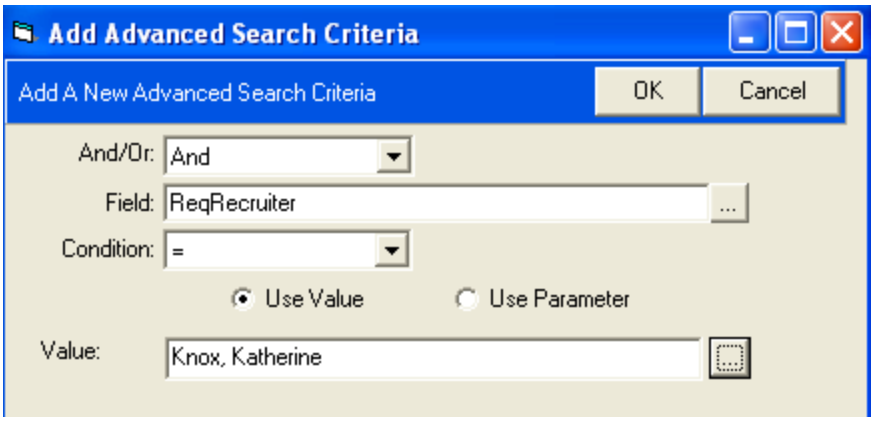


If lines of search criteria are being cut off in the *Advanced Search Settings*, the splitter bar can be used to widen the *Advanced Search Settings* section. Use the mouse to click on the splitter bar, drag to the right, and release.

Add another criterion for 'Recruiter = Katherine Knox' as follows. In the Build AdvancedSearch form, click on the criteria just added i.e. '*ReqStatus In List'* then right click to select '*Add Criteria'*.



Set the *And/Or* field to '*And'*.
Set the *Field* field to '*ReqRecruiter'* which can be found under Requisition Fields.
Set *Condition* to '=', which is the default.
Make sure '*Use Value'* is selected.



Set the *Value* field to '*Knox, Katherine'*..

Click OK to add the new criteria to the search and return to the *Build AdvancedSearch* page.

The AdvancedSearch should now look like this:



Click Save to save the new AdvancedSearch.

'Run at Startup' was checked so this search will automatically run whenever the User, who created this AdvancedSearch, logs into iGreentree. Clicking *Run* under *Hot Items* on the main iGreentree menu can also run this search. Or the User can also run this search by selecting it from AdvancedSearch/Search List.

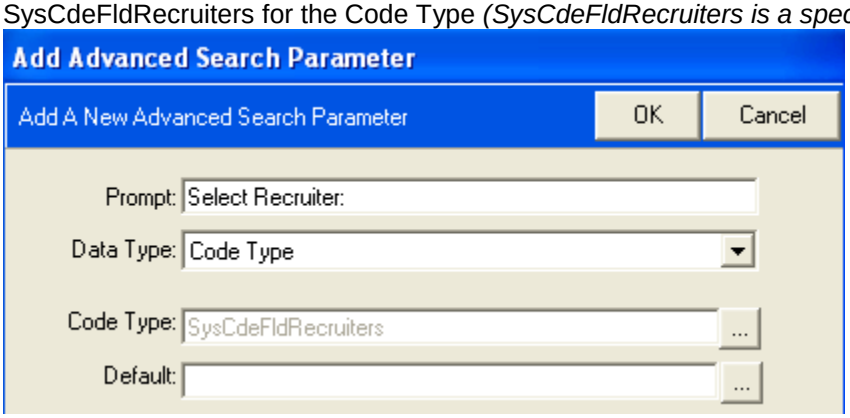
No other User can run this search because it was not checked, *Public for Run*. If this search needs to be made available for other Users *Public for Run* must be checked. However, keep in mind it cannot be used as a *Hot Items* search if it is *Public for Run*. If this search needs to be in both places, the User may want to use the *Copy New* feature to make a copy of the search for public use. The original is then retained for the *Hot Items* search.

Using Parameters

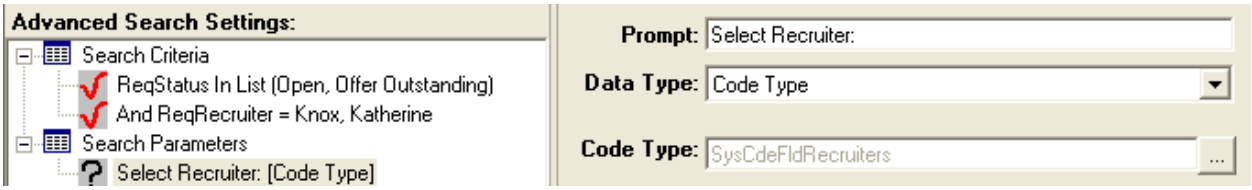
To make an AdvancedSearch prompt using a parameter, the User must first add a parameter, and then add it as search criteria. Parameters can prompt for dates, a text value (string), or a coded field. Parameters cannot be used for searches that are flagged as 'Run at Startup', as these searches must run automatically.

In the above example, AdvancedSearch 'Recruiter X Active Reqs', let's change the Recruiter criteria so that it prompts for a recruiter. First uncheck the 'Run at Startup' box and check both of the Public boxes.

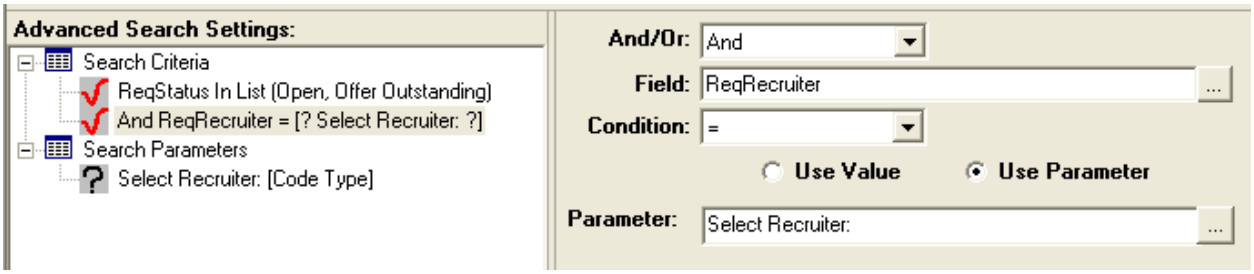
Right-click on Search Parameter for the *Add Parameter* dialog box. Enter the text that should be displayed when the User is prompted, and select 'Code Type' as the Data Type, and SysCdeFldRecruiters for the Code Type *(SysCdeFldRecruiters is a special code type for Recruiters)*:



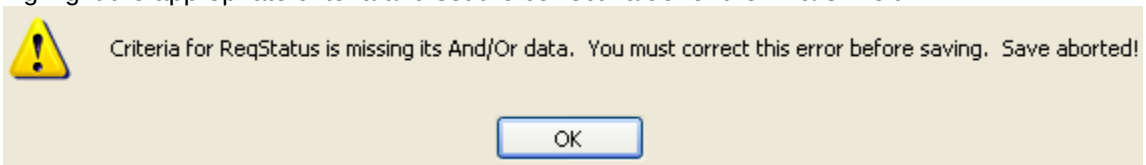
Click OK to save the parameter, which iGreentree will save and display using the 'prompt' text:



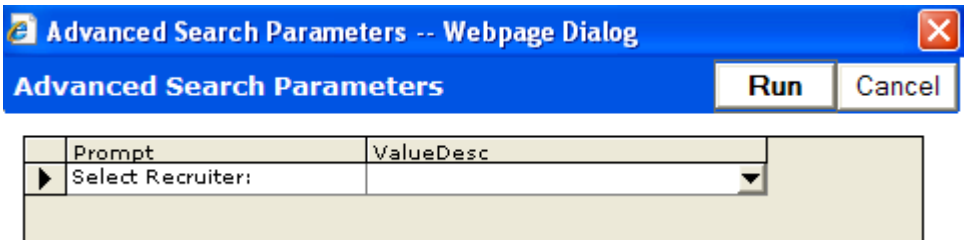
To use the parameter, click on the ReqRecruiter criteria and then click on the radio button to 'Use Parameter:'



Click (run saved search), if prompted that And/Or criteria is missing for a specific *Search Criteria*, highlight the appropriate criteria and set the correct value for the And/Or field.



When the search is run from AdvancedSearch/Search List, the User will see the following dialog box:



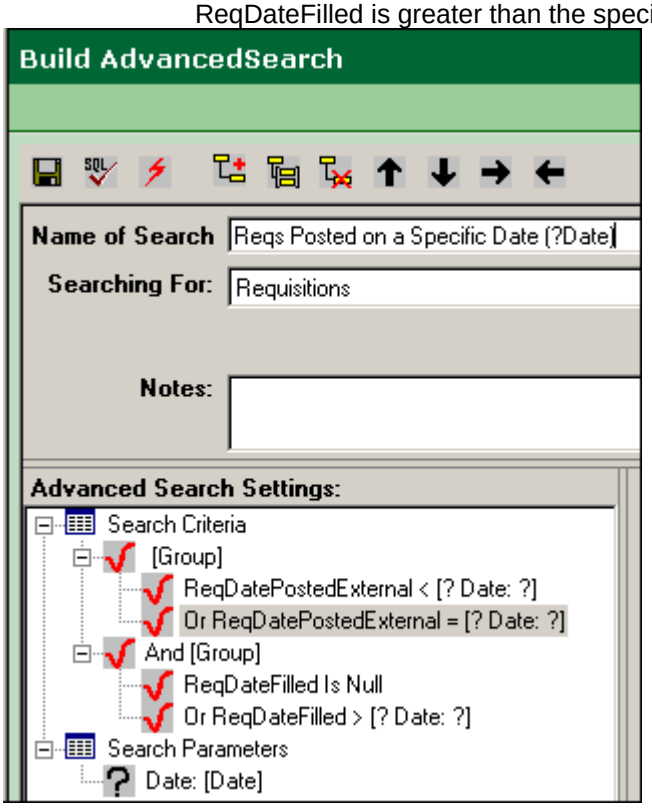
Click on the down-arrow in the ValueDesc field to select the Recruiter to run the search.

Using Groups

Groups of search criteria can be used to greatly extend the complexity of an AdvancedSearch. Below is an example of how the following search can be created:

Searching for requisitions posted on a specific day where:

Group 1: ReqDatePostedExternal is less than the specific date
Or
ReqDatePostedExternal is equal to the specific date
And Group 2: ReqDateFilled is Null
Or
ReqDateFilled is greater than the specific date



The indenting of the criteria indicates visually which criteria belong to which groups.

Helpful Tips for using Advanced Search

1. Parameters must be added before they can be used in search criteria.
2. Parameters are not allowed in searches flagged as 'Run at Startup.'
3. 'Run at Startup' searches must not be set to 'Public for Run' nor 'Public for Edit'.
4. Parameters using Recruiter should use SysCdeFldRecruiters as the Code Type.
5. Parameters using Hiring Manager should use SysCdeFldRecruitersandHireMgrs as the Code Type.
6. Rules for using the Fields Lists when adding Search Criteria:
   - When searching for Applicants, do not select Hiring Manager or Source/Expense Fields. Select only Applicant, Person/Requisition, and Requisition Fields.
   - When searching for Hiring Managers, do not select Applicant or Source/Expense Fields. Select only Hiring Manager and Requisition Fields.
   - When searching for Source/Expenses, do not select Applicant or Hiring Manager Fields. Select only Source/Expense Fields and Requisition Fields.
7. For searching for words in text fields, use the 'Includes' condition, eg 'ReqJobTitle Includes Unix.'
8. For ranges where 'equal to or greater than' or 'equal to or less than' are needed, use two criteria with an OR relationship. For instance, : AppDateEntered = Last Month OR AppDateEntered > Last Month.
9. The arrow keys at the top of the Build Search page  can be used to move criteria and groups without having to re-select them. Each item can be moved up, down, right, or left as needed to create the correct visual representation of the relationships so the search will return the desired results.

Reporting

Objectives
This chapter is for anyone who needs to enter and record information. After completing this chapter, the User will be able to:

- Run Search-Dependent Reports
- Run ReadyReports
- Understand the basics of Reports Maintenance and Editing

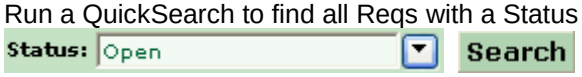
Search-Dependent Reports

Some reports are populated using the records the User chooses to include. These reports allow the User greater control but require searching for the desired data records first.

Requisition Reports

Although some Req reports can be found in *ReadyReports,* the reports that are found here allow the User to choose which Reqs to include before running the report. One of the primary reports that many Users need is a Requisition Activity report, which can be printed on paper or sent via email.

Run a QuickSearch to find all Reqs with a Status of *Open*



Select *Requisition Reports* from the *Action* menu or use the quick launch button  located on the toolbar.





Any report generated from this list will ONLY include data from the Reqs returned by our search results. (I.E. Open Reqs) Highlight the *Requisition Activity* Report and then click *Run*.

NOTE: The Requisition Reports may be modified or added to by the iGreentree Report Librarian.

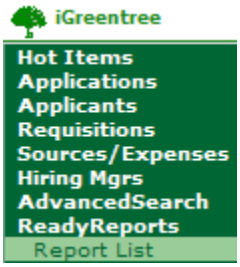
Applicant and Other Reports

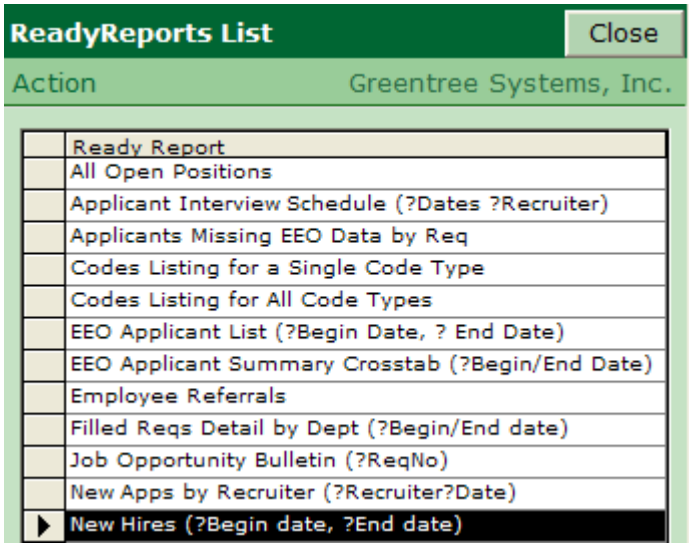
Just as described for Requisitions, reports can be run after performing searches on Applicants, Applications, Source/Expenses, and Hiring Managers. See the Source/Expense and Applicant Processing chapters for information about Search-Dependent reports for Sources, Expenses, Applicants and Hiring Managers.

ReadyReports

Although many reports can be run after performing a QuickSearch, the reports that are found here have the search criteria built right into the report definition. Although these reports are not as flexible as Search-Dependent reports, they are much easier to run. ReadyReports should be used for any report that is run with the same search criteria on a regular basis such as the Posting report, or a new hire report that is sent to Payroll.

Select *Report List* from the *ReadyReports* menu.



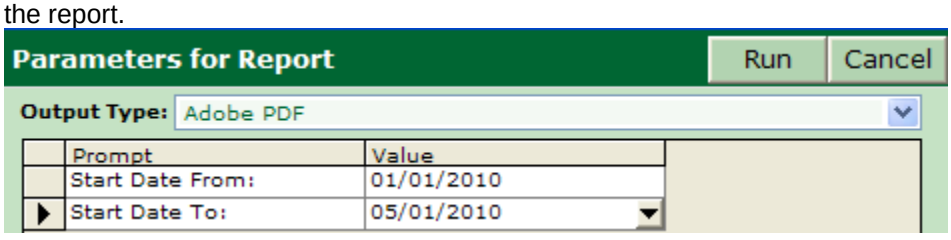

ReadyReports List
Close
Action
Greentree Systems, Inc.
Ready Report
All Open Positions
Applicant Interview Schedule (?Dates ?Recruiter)
Applicants Missing EEO Data by Req
Codes Listing for a Single Code Type
Codes Listing for All Code Types
EEO Applicant List (?Begin Date, ? End Date)
EEO Applicant Summary Crosstab (?Begin/End Date)
Employee Referrals
Filled Reqs Detail by Dept (?Begin/End date)
Job Opportunity Bulletin (?ReqNo)
New Apps by Recruiter (?Recruiter?Date)
New Hires (?Begin date, ?End date)

This list is different from the report lists seen earlier, since these reports do not require search criteria to be set. The records included in the report are those defined by the report.

To select a report to run, click on the line for the desired report, (for now use *New Hires*) then select *View Report* from the *Action* menu.



Some ReadyReports may prompt for parameters, allowing the User to narrow the records displayed on the report.



Enter a *Value* for each prompt (in our example, dates). Click inside the *Value* column to receive the button, click on the arrow to select the desired *Value*. Leave *the output type as* Adobe PDF *for now.*

NOTE: The Value *list will vary depending on the type of prompt hard coded into the report. For our example a calendar was presented, however the User could receive a value list of Recruiters, Hiring Managers, Codes, etc.*

Click Run *to generate the report.*

New Hires Report

Start Date Range from 1/1/2010 to 5/1/2010

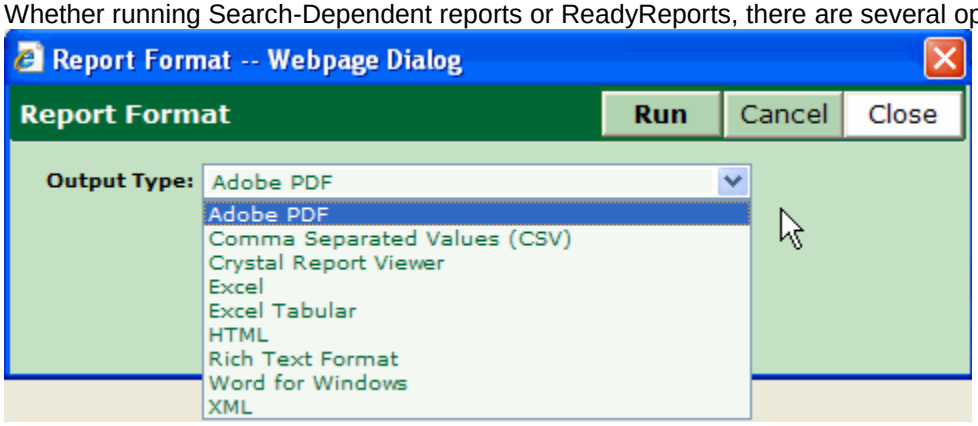
Name	Start Date	Gender	Race	Job Group	Req No.	Job Title	Department
Mejia, Kristian	03/01/10	F	W	5	2005-009	Sales Support Assistant	
Babbit, Roger	04/01/10	U	U	3	2005-032	Registered Nurse- Operating Room	Critical Care Unit

Total New Hires: 2

NOTE: If a report not seen in the iGreentree standard report library is needed or if an existing report requires a change, see the designated iGreentree Report Librarian or contact Greentree's technical support.

Options for Report Output

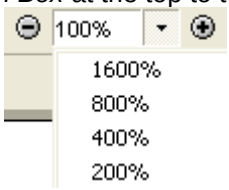
Whether running Search-Dependent reports or ReadyReports, there are several options for output.



Adobe PDF

A report that is generated in PDF (Portable Document Format) is in a very usable format because Acrobat Reader is frequently standard software on PC's. If Users do not have the Acrobat Reader they can download it at www.adobe.com

Use the scroll bars at the bottom and right side of the window to move around the current page. If there is more than one page of data use the *Navigation Box* at the top to toggle to another page.



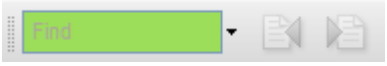
The User can also change the display size.

To print, the User must select the printer icon from the Adobe toolbar. Selecting *File/Print* from the Browser menu will result in the printing of a blank page.

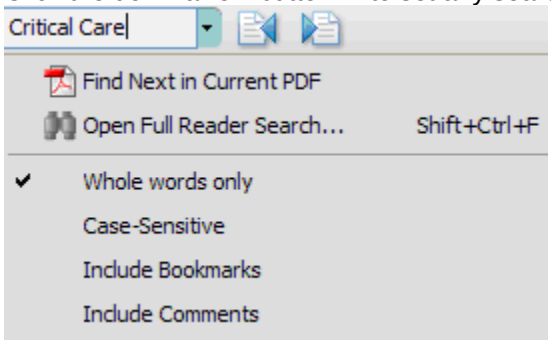
Before printing, the User can adjust the Page Setup (also from the File menu).

To save the file for later use, such as attaching to an email or storing on your computer, click  from the Adobe toolbar. Name the report as desired and select the location where the report should be saved.

To search for a specific word or phrase, click inside the Find box on the Adobe toolbar located at the top of the screen and type in the desired word or phrase.



Click the down arrow button  to set any search options needed.



Then, press the *Enter* key to start the search. If the text string is found, the User will be brought directly to where it is in the report. To find the next occurrence, click  on the Adobe toolbar. To find the previous occurrence, click  on the Adobe toolbar.

Comma Separated Value (CSV)

This output option tells Crystal Reports to provide the report output in CSV format. The intent of this feature is to export data for use with other systems needing CSV-formatted data. This is an advanced feature of Crystal Reports not normally supported by Greentree.

Crystal Report Viewer

This option can only be viewed by individuals with the Crystal Report viewer installed on their PC. All iGreentree Users had this installed with the client, but individuals without access to the iGreentree module may not be able to view the report. If the User wishes to manipulate or share the report with anyone else, we recommend using PDF or an output format listed below.

Excel

Choose this output format to bring data into a spreadsheet. If the User has Excel on his/her computer, the data will appear in an Excel file. From there, the file can be saved or emailed (using *Send To*).

Excel Tabular

Choose this output format to bring data into a spreadsheet. If the User has Excel on his/her computer, the data will appear in an Excel file. From there, the file can be saved or emailed (using *Send To*). *Note: Excel Tabular is an enhanced export feature in Crystal Reports which is designed to eliminate extra rows and columns to give a 'cleaner' spreadsheet that can be sorted and manipulated.*

HTML

HTML format can be used to create a web page that can be viewed with a web browser. Greentree recommends viewing a test report to verify that the formatting of the web page will meet your needs.

Rich Text Format and Word for Windows

If a report needs to be emailed or saved to a file, consider either RTF or Word for Windows. Try each of these options, and use whichever works best. The User can use "*Save As"* to save to a file, or "*Send T*o" to send the report via email.

XML

This output option tells Crystal Reports to provide the report output in XML format. The intent of this feature is to export data for use with other systems needing XML-formatted data. This is an advanced feature of Crystal Reports not normally supported by Greentree.

Administration and Maintenance

Objectives

This chapter is for anyone who needs to administer or maintain the iGreentree system. After completing this chapter, the User will be able to:

- Add and modify Code Values and their related fields
- Group Applicants or Requisitions using different Filing Systems
- Add, modify and delete different documents such as letters
- Change system and module configuration settings
- Perform system maintenance functions such as archiving and purging records, updating the system announcements and determining the number of users currently logged into the system.

Administration

Most of the administration and maintenance functions for iGreentree will be performed by the iGreentree Administrator.

Backups and Troubleshooting

The IT/IS department should be backing-up the iGreentree database and related directories on a regular basis. These should be scheduled for consistency. For ease of implementation, a pre-determined schedule should be decided upon. Greentree recommends a nightly backup with at least one week's worth of backups made available. Note: For hosted customers, all backups are maintained by Greentree.

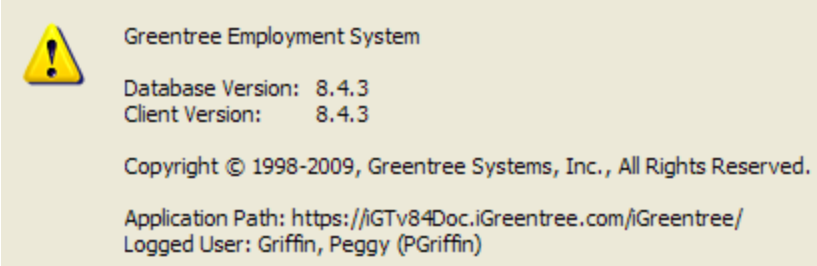
Individual Users should report problems to the iGreentree Administrator. The administrator should report iGreentree problems immediately to Greentree. The administrator can contact Greentree by calling (800) 348-8845, sending an email to Support@GreentreeSystems.com or using the Customer corner located at www.greentreesystems.com.

Online Information and Help

In most iGreentree windows, there is a *Greentree Systems, Inc.* link near the top right corner. Click on this link to see:



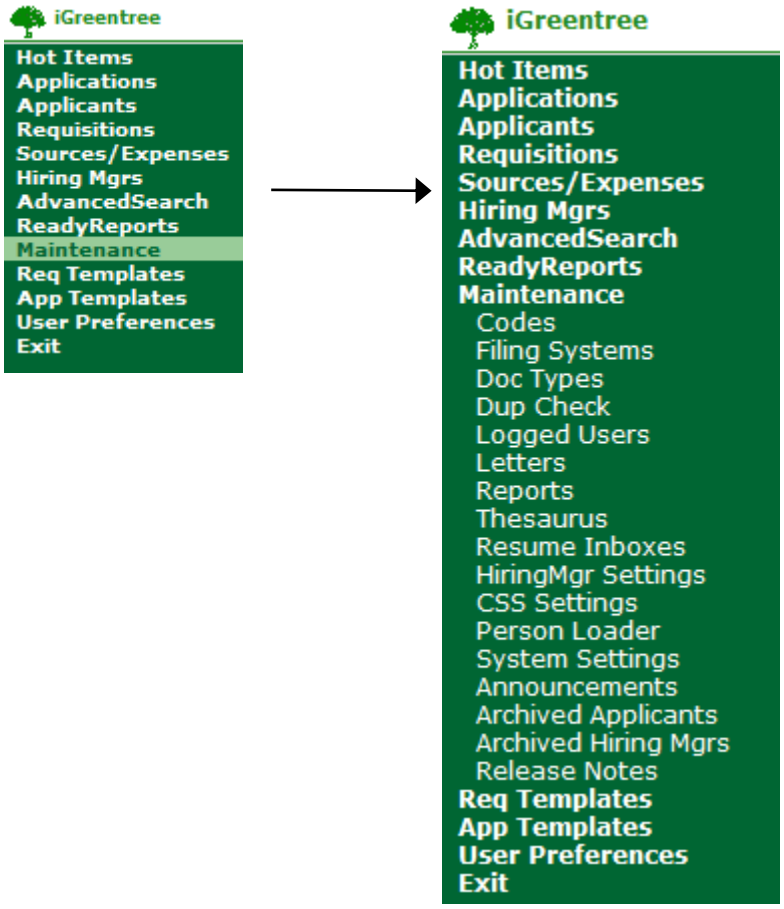
- About Greentree Employment System: This selection displays the version number (database and client), as well as copyright information, web address, and the current logged User.


Greentree Employment System
Database Version: 8.4.3
Client Version: 8.4.3
Copyright © 1998-2009, Greentree Systems, Inc., All Rights Reserved.
Application Path: https://iGTv84Doc.iGreentree.com/iGreentree/
Logged User: Griffin, Peggy (PGriffin)

- Greentree Web Site: This selection provides a direct link to the Greentree web site, http://www.GreentreeSystems.com. This site has a great deal of information on Greentree products, training options, Customer Service, etc.
- Greentree Support E-Mail: This selection provides a link to directly send an email to Greentree's Technical Support team at Support@GreentreeSystems.com.
- Customer Corner: This selection provides a direct link to the Customer Corner section of Greentree's website, where you can sign in and have access to User Manual Documents, Knowledge Base articles, submit a Support Ticket and/or view the status of any submitted tickets.
- Greentree Contact Info: This selection links you to the Contact page on Greentree's web site.

Maintenance

Select *Maintenance* from the main menu. This will expand to display all in-Application maintenance items.



The iGreentree Administrator (or other Users if permitted) will use these options to maintain the iGreentree system. Permissions for menu items are defined in Security Manager. See **Security**

Manager documentation for more information. Please note: iGreentree Express Users do not have access to all Maintenance items.

NOTE: An within a Maintenance item indicates a value or item that is completely maintained by an organization. An icon next to a Maintenance item indicates a value or item that is required by the iGreentree system and is not to be removed or tampered with by an organization.

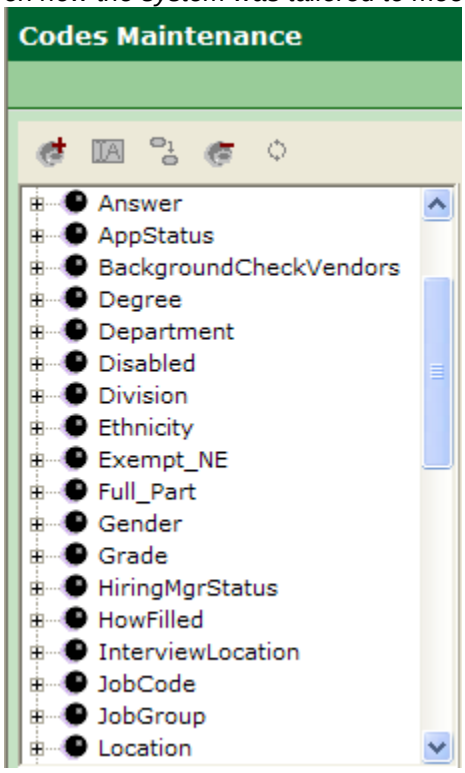
Codes Maintenance

Codes Maintenance is used to Add, Rename, Merge, and Delete Code Values in the database. *To maintain greater control over Code Values, restrict access to this menu item via* ***Security Manager****.* Codes Maintenance will be MUCH easier if restrictions are in place that permit only approved Users to add and change Code Values. Greentree recommends that the iGreentree Administrator review and modify code values every six months to ensure that clean, concise, and pertinent codes are available in the iGreentree Application.

Select *Maintenance* | *Codes*.



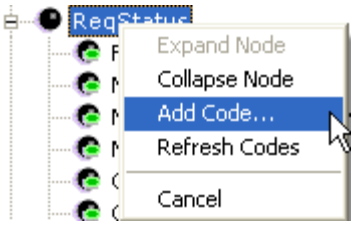
The partial list of Code Types displayed here may be different from the list in the live system, depending on how the system was tailored to meet organizational needs.



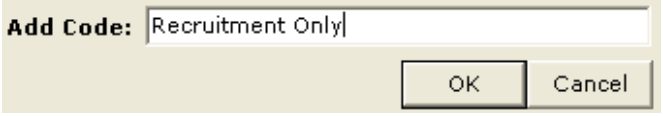
To view the Code Values existing for a Code Type*, select the '+' next to the* Code Type*. All existing values will display indented underneath the* Code Type*.*

Adding New Code Values

Highlight the Code Type and select the *Add Code* icon or, if you prefer, right click the Code Type and select *Add Code.*

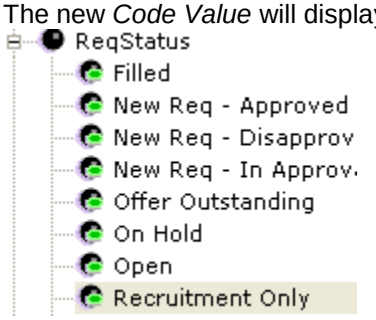


An Add Code *window displays. To be consistent with the formatting of other* Code Value *entries, type in the new Code Value using* upper and lower case. The new *Code Value* can be up to 200 characters long, using any combination of letters, numbers, and spaces needed.



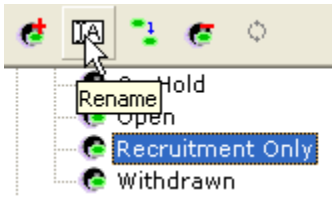
Select 

The new *Code Value* will display indented below the selected Code Type.

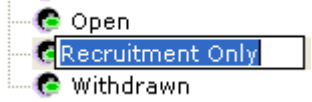


Renaming Code Values

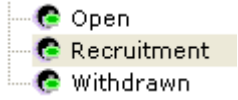
Highlight a *Code Value* and select the *Rename Code* icon  or, if you prefer, right click the Code Type and select *Rename.*



The *Code Value* will be made active to edit.



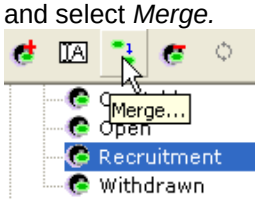
Type in the desired renaming value and hit the *Enter* key on the keyboard.



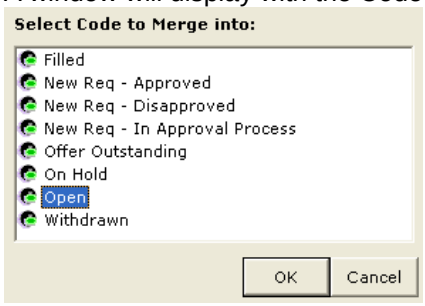
When a Code Value is Renamed*, the value will be* Renamed *on all records that are using the Code Value. The* Renaming *function should be used if a Code Value* is misspelled, or if the value is to be expanded on. If a *Code Value* is to be changed to a value that already exists, the *Merge* function should be used.

Merging Code Values

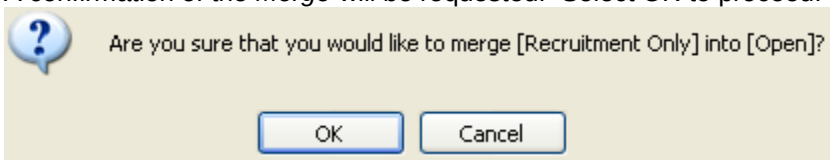
Highlight a *Code Value* and select the *Merge Code* icon or, if you prefer, right click the Code Type and select *Merge.*



A window will display with the Code Values. Highlight the Code Value to *Merge* into, and click *OK.*



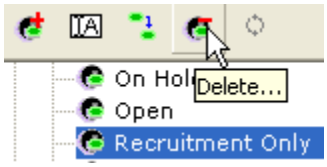
A confirmation of the *Merge* will be requested. Select *OK* to proceed.



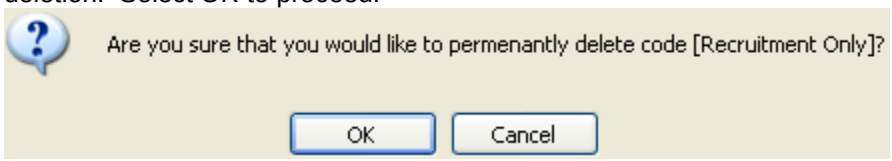
When a Code Value is Merged*, the value will be* Merged *on all records that are using the Code Value. The* Merging *function should be used if a Code Value* is still to be recorded, but recorded as another Code Value. Note: Since merging codes will update database records, this process may take a few minutes to complete.

Deleting Code Values

Highlight a Code Value and select the *Delete Code* icon or, if you prefer, right click the *Code Type* and select *Delete*.



Once the *Delete* has been selected, a message box will display asking for confirmation of the *Code Value* deletion. Select *OK* to proceed.



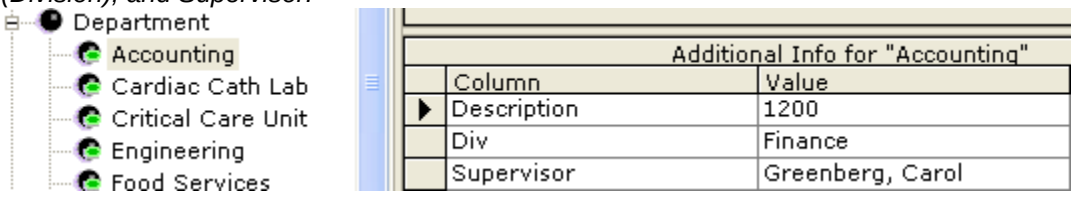
The *Delete* functionality should be used with caution. Once a Code Value has been *deleted* from a Code Type the *Code Value* will no longer be available to the iGreentree Application. Therefore, all records on which this *Code Value* was used will no longer have any reference to or history of this value association. It is strongly recommended that a few QuickSearches and/or Advanced Searches be performed with regards to the *Code Value* marked for deletion, before a *Delete* is performed to identify records that may

be impacted. If a Code Value is deleted in error, the only way to restore the value and the affected records to their prior state is to perform a restore from backup. In doing this, there is a potential data loss of work completed after the backup was done and before the deletion took place. Please contact Greentree for more information regarding a backup and restoration procedure.

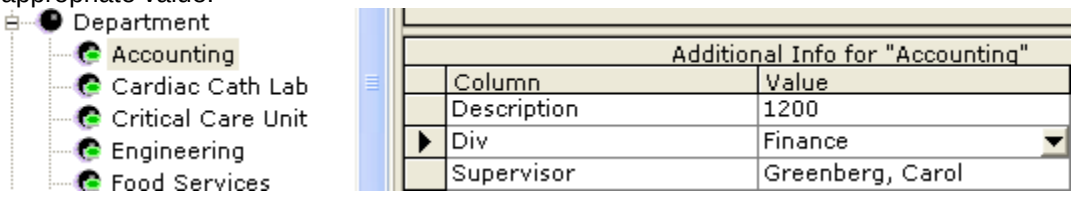
If a Code Value is no longer needed, but it is still good information to know and track for records that used the code, Greentree recommends that the Code Value be *Renamed* to something like 'zz_CodeValue'. In doing so, the value will drop to the bottom of any selection list (lessening the chances of a User selecting the outdated value) and it will enable the information to still be recorded on the existing records.

Lookup Tables and Auto-Fill Code Types

The Lookup Table *allows a User to input additional information for a particular Code Value to be utilized elsewhere in the iGreentree Application, Letters, and/or Reports. For example, the Code Type 'Department' has a* Lookup Table *of additional information for a Department's associated Description, Div (Division), and Supervisor.*



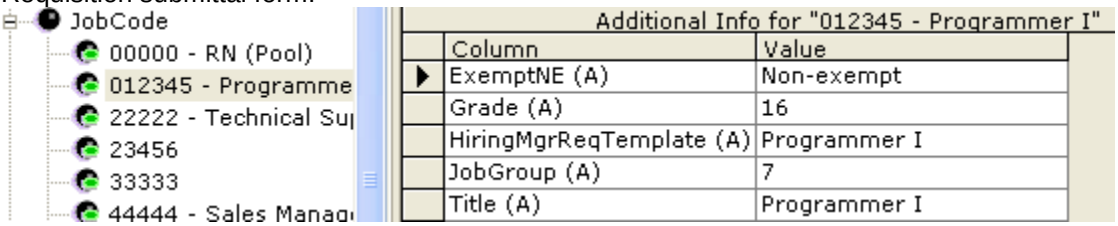
The *Lookup Table* appears to the right of the Codes column. To change information in a *Lookup Table*, simply click in the 'Value' column field next to the 'Additional Information' name of interest and type. If the 'Additional Information' of interest refers to a Code Type, select the dropdown arrow to select the appropriate value.



In a standard iGreentree Application the following Code Types have a *Lookup Table*:

- AppStatus
- Department
- Ethnicity
- JobCode
- Objective (A-W)
- ReqStatus
- Veteran
- BackgroundCheckVendors
- Disabled
- Gender
- JobGroup
- Race
- Result
- Degree
- Division
- Grade
- Location
- ReqApprovalStatus
- Test

When a User or Hiring Manager is completing a Requisition and selects a Code Value that has associated *Auto-Fill* information, the designated fields will automatically populate on a record as a result of selecting the Code Value. *Auto-Fill* fields are designated with '(A)' in the Column after the lookup field name. For example, the Code Type 'JobCode' will *Auto-Fill* the Exempt/NE, Grade, JobGroup, and Title fields on a Requisition. In addition, 'JobCode' can apply a Requisition template to the Hiring Manager Requisition submittal form.



In a standard iGreentree Application JobCode is the only Code Type that has the *Auto-Fill* functionality incorporated. A Tailored system may have others, i.e. Grade may *Auto-fill* salary fields on the Requisition form.

Special Code Types

There are several Code Types that have special properties the iGreentree Administrator and Users need to be aware of. These Code Types drive the functionality of iGreentree as well as the Hiring Manager and Candidate Self-Service modules. **In order for iGreentree and the modules to function fully and correctly, these properties MUST be completed for each and every Code Value of the identified Code Type.** They are as follows:

AppStatus: This is the overall status of an Applicant in an organization, and populates the *Status* field on an Applicant record. This status indicates the point an Applicant is at with regards to the employment process in an organization. It is not related directly to a specific Requisition (*Result)*.

CodeSelectableByHiringManagers: (Hiring Manager module) Determines if the Code Value is available to the Hiring Managers when completing the *Make Offer* or the *Hire* functions when setting the 'Applicant Status' value.

Degree: This code has a special lookup table where a ranking is identified for each 'Degree' Code Value. This lookup table is utilized when *Finding Apps* as defined in the Requisition Attachment | Search Criteria. Search Criteria assumes a degree with the selected rank or higher.

Degree/Rank: (iGreentree Application) Determines valid degrees in Search Criteria. For example, if *Associates* has a rank of *1, Bachelors* has a rank of *2*, and *Masters* has *3*, a Search Criteria that includes 'Associates' will also find Applicants who rank higher (having a Bachelors or Masters degree).

Objective: Use Objective to record the general type of job they are interested in. This Code Type is meant to record very general categories of positions, not specific job titles.

Name: (iGreentree Application) Provides a place for an expanded name of the Code Value.

ReqApprovalStatus: This Code Type defines the approval process points and their meaning in Hiring Manager module and audits. These lookup fields are used to trigger the next step of the approval notification process as each approver reviews the Requisition in the Hiring Manager module.

IsApproved: (Hiring Manager Module) Defines a Code Value indicating a Hiring Manager has reviewed and approved the submitted Requisition identifying them as an Approver.

IsRejected: (Hiring Manager Module) Defines a Code Value indicating a Hiring Manager has reviewed and rejected the submitted Requisition identifying them as an Approver.

NotReviewed: (Hiring Manager Module) Defines a Code Value indicating a Hiring Manager has not reviewed the submitted Requisition identifying them as an Approver.

ReqStatus: This is the overall status of a Requisition in an organization, and populates the *Status* field on a Requisition record. This status indicates the point a Requisition is at with regards to the recruiting process in an organization. The value will drive many Reports and CSS Posting query results. Additionally, it may impact Resume Processing, Log To Req, and the Offer/Hire/Fill Actions.

CodeSelectableByHiringManagers: (Hiring Manager module) Determines if the Code Value is available to the Hiring Managers when completing the *Make Offer* or the *Hire* functions when setting the 'Requisition Status' value.

Dashboard_IsNewReqApproved: If set to YES, this indicates that a Requisition with this status will be included in the *New Reqs - Approved* category on the Dashboard.

IsClosed: (iGreentree Application and CSS) Determines if the Code Value is that of a Requisition that is not being actively recruited for. In addition, when a Requisition is assigned a status code with this value set to "yes" the CSS functionality that allows the Applicant to withdraw themselves from the position is disabled.

IsCurrentForHiringMgr: (Hiring Manager module) Determines if the Code Value is that of a Requisition that should be considered as a 'Current' listing (instead of 'Year to Date', 'Last 12 Months', 'All Reqs') for a Hiring Manager.
IsHotJob: If set to YES, this indicates that a Requisition with this status will be displayed as a *HotJob* in CSS.
IsOpen: (iGreentree Application, CSS, Hiring Manager module) When set to Yes, means Requisitions with this status are posted to CSS.
IsPendingApproval: (iGreentree Application, CSS, Hiring Manager module) Determines if the Code Value is that of a Requisition that is in the approval process and is not being actively recruited for.

Result: A *Result* indicates an Applicant's disposition relating to a specific Requisition. A Result can be used for the Log to Req (Application Status), Route, Interview, Offer, and Hire Actions.
Allow CSSDocUploadAfterSubmit: Determines if an Applicant can upload additional documents for a specific Requisition if they have this result code associated with it.
AllowCSSFormResubmit: If this is set to YES then any Application with this Result may be resubmitted by the Applicant through CSS.
ApplicantsViewableByHiringManagers: Determines if an Applicant with this specific result is viewable by the Hiring Manager in Hiring Manager module.
CodeSelectableByHiringManagers: Determines if the Code Value is available to the Hiring Managers when setting the 'Result for this Req' value for the selected and non-selected Applicants thru the Hiring Manager Module.
ColorGraphic: Determines the visual representation of the 'Result For This Req' column of an Applicant when a Hiring Manager is reviewing their information via the Hiring Manager module.
CSSDescription: Defines the equivalent value of an iGreentree *Result* code that an Applicant will see when viewing their Application Status on-line.
GraphicTextEquivalent: This item is not currently being used.
IsEEOApplicant: Defines whether or not an Applicant should be included in EEO report output based on their *Result* value for a Requisition. If they did not pass the pre-screen questions, are they considered an Applicant for EEO purposes?
IsFinal: Determines whether the *Result* value assigned to an Applicant for a particular Requisition is a 'final' value. If the value is 'final,' the *Result* will not be overwritten in performing actions that request a *Result* to be populated, such as Hire or Fill. Also, the Applicant will no longer be able to withdraw their Application via CSS.
IsHired: Determines whether a particular Code Value indicates the Applicant was *Hired* for the Requisition. This allows Users to create several different *Results* that will record an Applicant as being *Hired*.
IsNewApplicant: Determines if an Applicant that has this *Result* for a Hiring Manager's Requisition is considered to be a new Applicant when selecting the 'New Applicants' menu item in Hiring Manager module.
IsNotifyReviewer: Determines if Applicants assigned this result should be included in App/Req Notification emails, either batch or Immediate.
Send Automated AppReq Reject Letter: When an Application is set to a Result that has this value set to YES then an automatic rejection letter is generated and sent to the Applicant. No human intervention is required. Refer to Maintenance | System Settings | AppReq Automated Rejects for the specific letter that is sent.

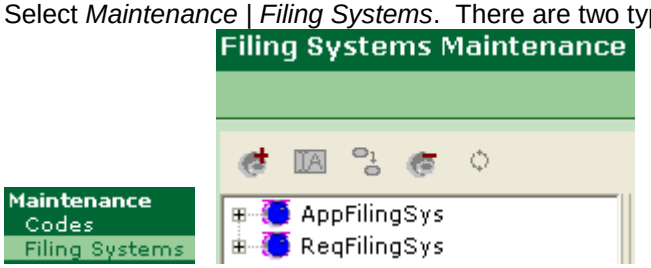
Filing System Maintenance

Filing Systems are meant to provide an easy way to identify different groups of Applicants (such as External and Internal) and Requisitions (such as Regular and Temporary). Any group of Applicants whose Applications and resumes would be stored in a separate drawer or who will be given a separate range of ID numbers should be placed in a separate iGreentree Filing System. Requisitions with different formats for Req numbers should also be set in separate Filing Systems.

When considering whether to create new *Filing Systems*, searching and reporting should be factored in. In addition, *Filing System* can be used to restrict a User's direct access to certain groups of records. See the **Security Manager** (Row Security) documentation for more information.

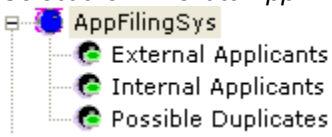
Filing Systems are maintained similar to *Codes.* Please refer to **Codes Maintenance** for information regarding the *Add, Rename, Merge, and Delete* functions for more detailed information.

Select *Maintenance* | *Filing Systems*. There are two types of *Filing Systems* – Applicant and Requisition.

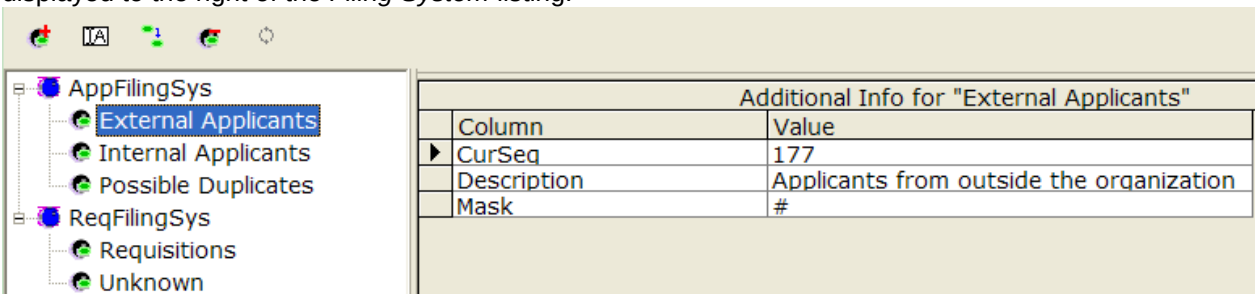


Applicant Filing Systems

Select the '+' next to *AppFilingSys* to display the current Applicant *Filing Systems.*



To view the current settings of a *Filing System*, select the *Filing System* of interest. The settings will be displayed to the right of the *Filing System* listing.



Separate filing systems would be appropriate for Internal Applicants (who may complete different paperwork and go through a different process) and External Applicants. Also, a Possible Duplicates filing system would be a way to separate Applicants who may have submitted several resumes until someone can review them and move or update their record appropriately. Lastly, as another example, in a hospital organization it may be beneficial to file Nursing Applicants separately from Non-Nursing Applicants.

CurSeq: (Current Sequence Number) Defines the next number that will be assigned when a new Applicant is added to the filing system. As Applicants are added, this number will increase automatically by a count of one.

If the CurSeq Number needs to be altered, be careful not to enter a number that will conflict with the ID number range of another filing system. Each Filing System should have its own unique range of ID numbers. These ranges should be selected according to relative size, allowing plenty of room for potential growth. The highest ID number available for Applicants is *999999* - plan the ranges for each filing system accordingly.

***Example*:** The 'External Applicants' filing system begins with a CurSeq of 1 and 'Internal Applicants' filing system begins with a CurSeq of *900001*, and 'Possible Duplicates' filing system begins with a CurSeq of

800001. This allows for 800,000 'External Applicants,' 200,000 'Internal Applicants,' and 99,999 'Possible Duplicates.'

- If the User tries to change the CurSeq number to a number that has already been assigned to an Applicant, the next Applicant entered will get the next available number above that existing number.
- Users must be careful when creating new filing systems. Once an ID number has been given, it cannot be changed unless the Applicant is moved to a different Filing System using the *Change Filing System* action.
- Greentree Systems recommends NOT making a new filing system for each year, since ID number ranges would become very limited. It is easier to keep all similar Applicants together in one filing system, and use date fields and other criteria to separate them in searches and reports.

Description: Greentree Systems recommends the selectable Filing System names be kept short in length. The Description allows for the extended name to describe which record types are stored in this Filing System.

Mask: Each Applicant *Filing System* can have a unique mask to assign ID numbers. A *Mask* must be assigned to specify the format of ID numbers, up to 8 characters. The following characters are the options from which a *Mask* is defined:

- # for a digit assigned automatically by way of the *CurSeq* field
- Standard alpha and numeric characters as well as h*yphens and slashes*

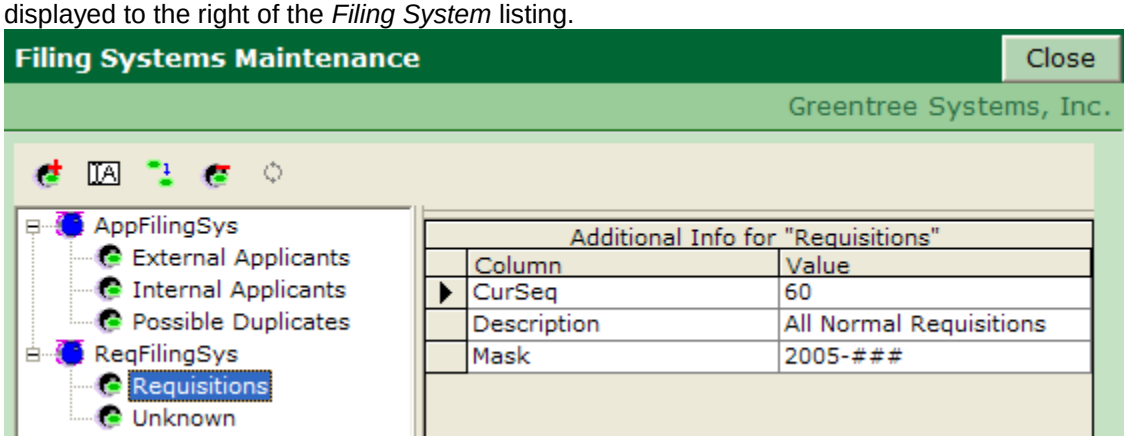
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Requisition Filing Systems

Select the '+' next to *ReqFilingSys* to display the current Requisition *Filing Systems.*



To view the current settings of a *Filing System*, select the *Filing System* of interest. The settings will be displayed to the right of the *Filing System* listing.



Requisition Filing Systems allow for separate numbering and formatting of Requisitions. For example, a separate Filing System can be created for each location or Requisition type that will require a different but systematic numbering.

CurSeq: (Current Sequence Number) Defines the next number that will be assigned to the '#' placeholders of the *Mask* when a new Requisition is added to the filing system. As Requisitions are added, this number will increase automatically by a count of one.

Description: Greentree Systems recommends the selectable Filing System names be kept short in length. The Description allows for the extended name to describe which record types are stored in this Filing System.

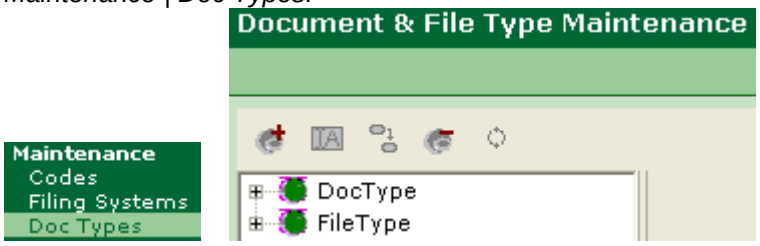
Mask: Each Requisition *Filing System* can have a unique mask to assign Req numbers. Req numbers can be either manually or automatically assigned. A *Mask* must be assigned to specify the format of Requisition numbers, up to 12 characters. The following characters are the options from which a *Mask* is defined:

- # for a digit assigned automatically by way of the *CurSeq* field
- ? for a character to be keyed in by the User when the Requisition is initially saved
  NOTE: Filing Systems *that prompt for character entry upon saving cannot be utilized by Requisitions entered via Hiring Manager module.*
- Standard alpha and numeric characters as well as h*yphens and slashes*

Example: The *CurSeq* is *1*, the *Mask* is *09-###.* The first Req number assigned will be *09-001*, the second as *09-002*, etc. *The '09' are 'hard coded' to represent the year the Req was opened, 2009, and the first two '#''s are utilized as placeholders until the* CurSeq *reaches 100.*
Example: The *CurSeq* is *101,* the *Mask* is *###-??* . The first Req number is *101*, and prompts the User to enter to up to 2 additional characters. If the person enters *AA*, the Req number first assigned would be *101-AA*.
Example: A *Mask* of ???? allows the User to assign four characters, the full Req number, without using the *CurSeq* information.
Example: The *CurSeq* is *119*, the Mask is *OS09-###*. The next Req number is assigned will be *OS09-119.* Illustrating that *alpha character can be used as part of the 'hard coded'* Mask.
Example: The *CurSeq* is *1000*, the Mask is *2009-###.* The req number prior to that would have been *2009-999.* The next Req number assigned will be *2009-1000* even though extra characters are not present in the Mask. However, there will be an impact on sorting because 2009-1000 will display numerically before 2009-999, as iGreentree sorts from left to right. *If over 1000 Reqs are expected in this scenario, enter an extra digit in the* Mask *to make sorting by Req number more orderly.*

Doc Types and File Types

To attach and save additional documents to an Applicant, Req, Source or Hiring Manager record, *Doc Types* need to be identified and defined. Note: Doc Types and File Types highlighted in red are unable to be deleted or changed as they are intrinsic to the iGreentree System functioning correctly. Select *Maintenance* | *Doc Types.*

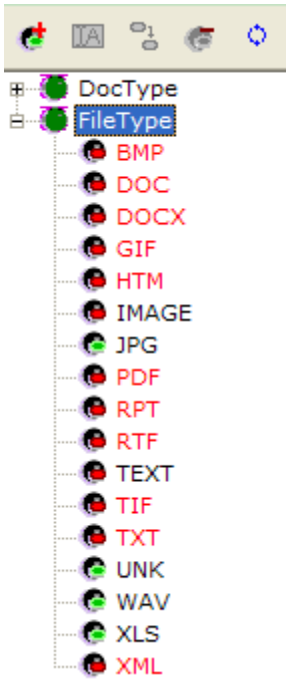


Each *Doc Type* needs to be completed with a *File Type* association for proper usage.

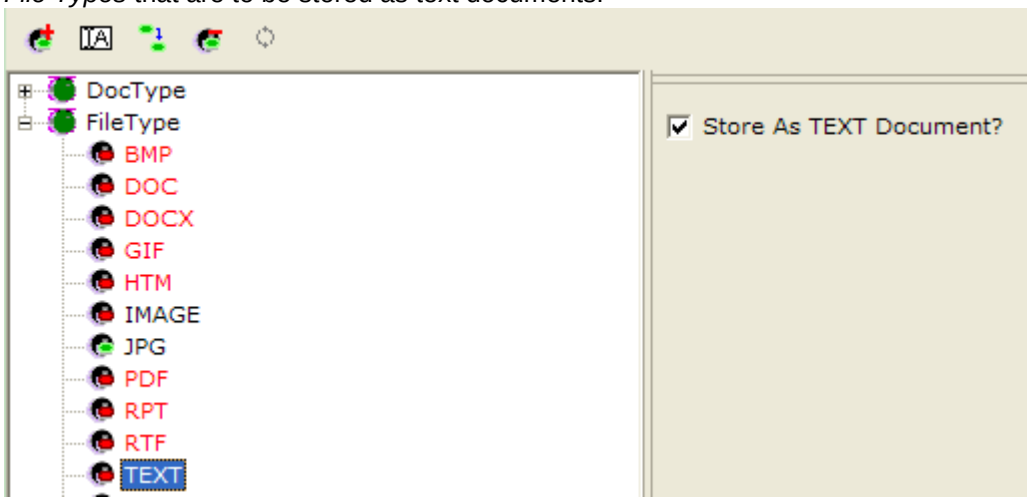
The *File Type* of an electronic document is determined by the Application that is used to view the document, and is the three-character extension of a filename. For example, a Word document is of *File Type* 'DOC' (filename.doc), Excel Spreadsheets are of *File Type* 'XLS' (filename.xls), etc. The iGreentree Application will be delivered with all of the standard electronic file types available in the marketplace.

File Types are maintained similar to *Codes.* Please refer to **Codes Maintenance** for information regarding the *Add, Rename, Merge, and Delete* functions for more detailed information.

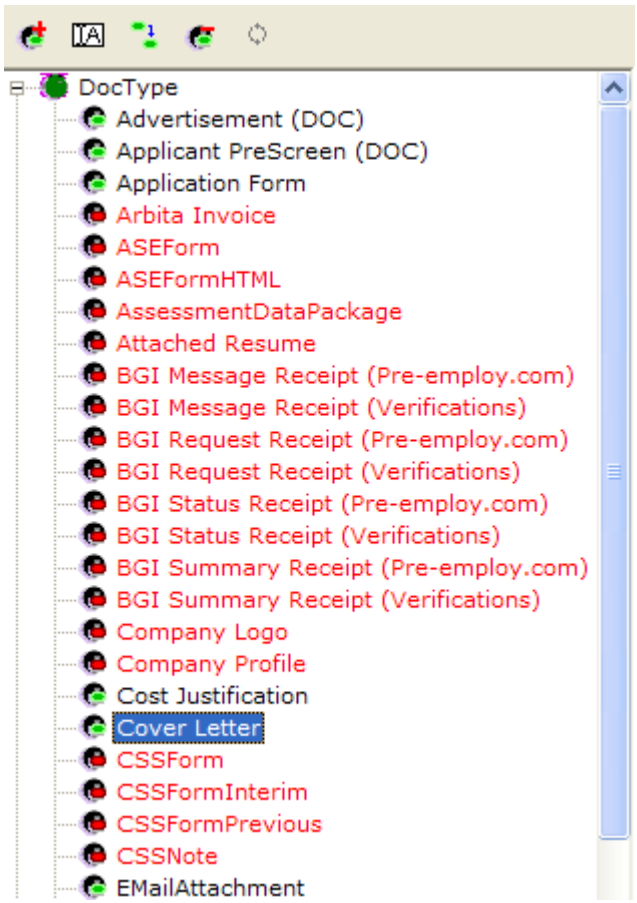
NOTE: Contact Greentree Systems before deleting any Doc Types or File Types *delivered with the iGreentree Application.*



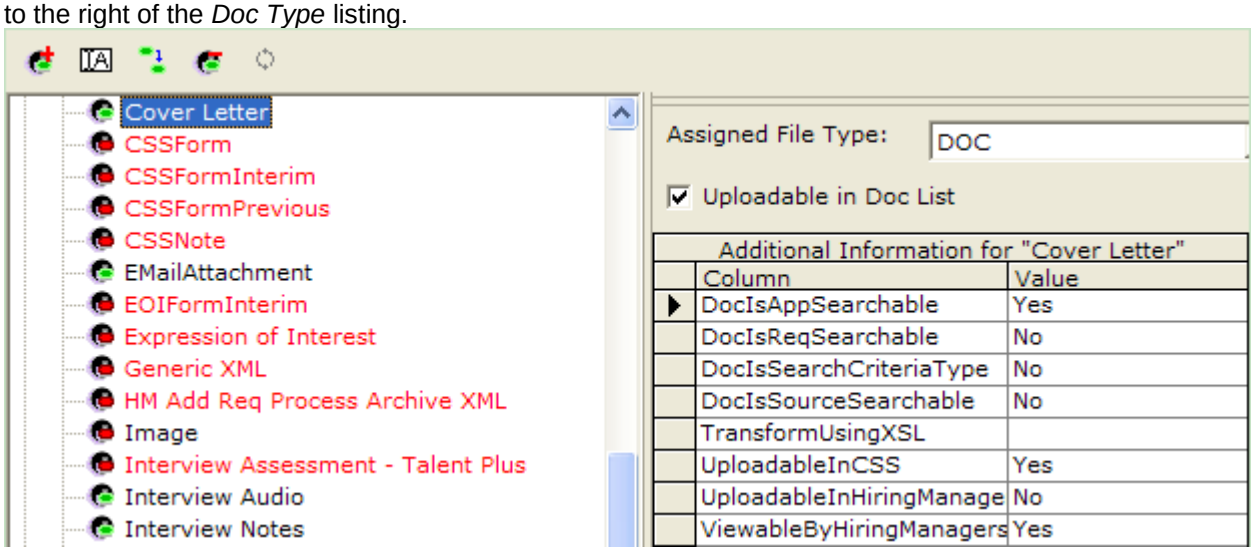
After *Adding* a *File Type*, it needs to be decided if the document should be stored as a 'TEXT Document.' If yes, be sure to check the box as indicated below. Typically, 'RTF,' 'TEXT,' and 'TXT' will be the only *File Types* that are to be stored as text documents.



Doc Types are generic names given to uploaded documents to give the User an idea as to the type of information will be viewed when the document is selected. *Doc Types* are maintained similar to *Codes.* Please refer to **Codes Maintenance** for information regarding the *Add, Rename, Merge, and Delete* functions for more detailed information.



To view the current settings of a *Doc Type*, select the *Doc Type* of interest. The settings will be displayed to the right of the *Doc Type* listing.



Each *Doc Type* must have the following settings identified. Failure to define these settings will limit the functionality of the iGreentree Application, CSS, and Hiring Manager modules.

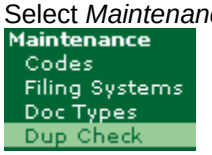
Assigned File Type: (iGreentree Application, CSS, Hiring Manager module) Determines the *File Type* ofthe selected document, i.e. what Application should the system use to view the document?

Uploadable in Doc List: (iGreentree Application) Determines if the *Doc Type* selected should be option as a type of document a User can upload. *Doc Types* that have a specific *Attachment* identified for them should not have this box selected. i.e. Job Description, Resume Text, etc…
DocIsAppSearchable: (iGreentree Application) Determines if a *Doc Type* is an option when a User is performing a 'Contains' QuickSearch from the Applicant QuickSearch screen.
DocIsReqSearchable: (iGreentree Application) Determines if a *Doc Type* is an option when a User is performing a 'Contains' QuickSearch from the Requisition QuickSearch screen.
DocIsSearchCriteriaType: (iGreentree Application) Determines if a *Doc Type* is a 'Text Search' option for a User when defining the elements of the 'Search Criteria' Attachment for a Requisition.
DocIsSourceSearchable: (iGreentree Application) Determines if a *Doc Type* is an option when a User is performing a 'Contains' QuickSearch from the Sources/Expenses QuickSearch screen.
UploadableInCSS: (iGreentree Application, CSS, Hiring Manager module) Determines if a *Doc Type* is a document that an Applicant, who is applying for a Requisition via CSS, could be requested to submit along with their Application.
UploadableInHiringManager: (Hiring Manager module) Determines if a *Doc Type* is a document that a Hiring Manager can upload and attach to the Requisition or Applicant.
ViewableByHiringManagers: (Hiring Manager module) Determines if a *Doc Type* is a document that a Hiring Manager should have access to if available for an Applicant.

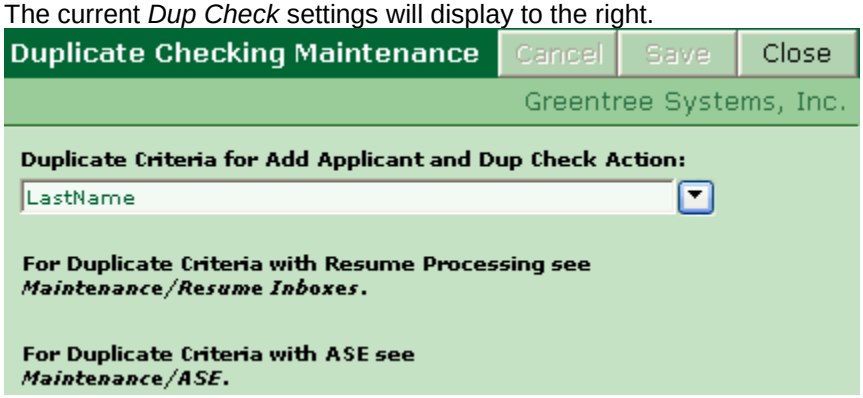
Dup Check

Dup Check is the setting that defines the criteria to determine if the Applicant who is manually being entered in to iGreentree via the 'Add Applicant' form is a potential duplicate (has an existing record). The *Dup Check* is invoked when the 'Save' button is selected. The *Dup Check* is also utilized when a User performs the 'Dup Check' Applicant Action.

Select *Maintenance* | *Dup Check.*

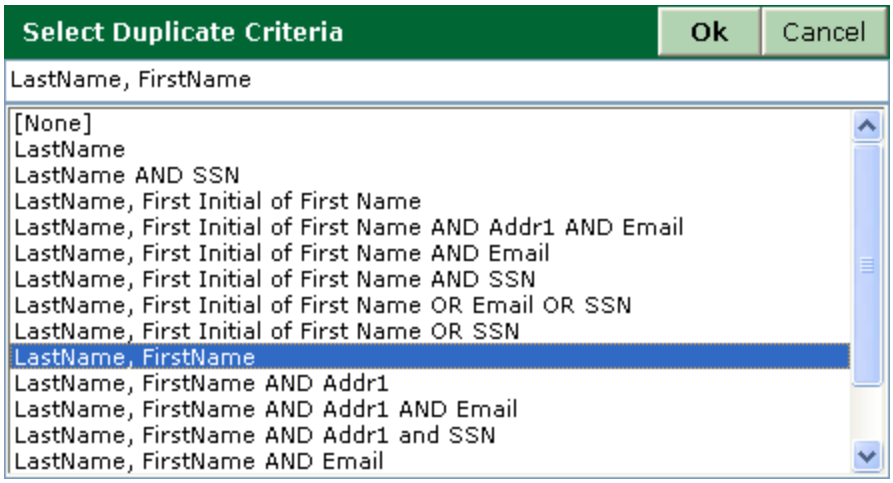


The current *Dup Check* settings will display to the right.



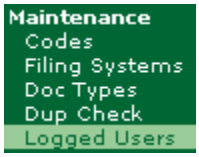
NOTE: Automated Resume Processing (ARP) has duplicate checking criteria defined elsewhere. See Maintenance | Resume Inboxes documentation respectively, for more information.

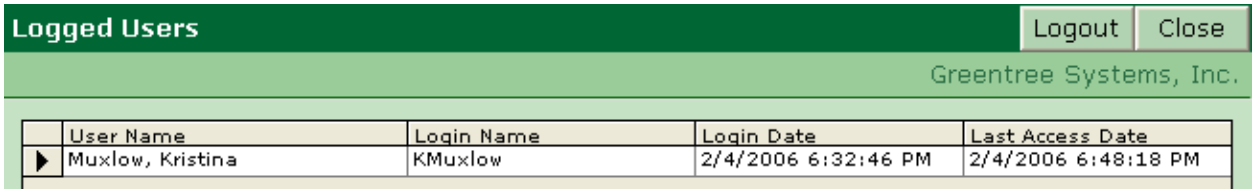
There are several *Dup Check* criteria selections to choose from. Review the list by selecting the down arrow and highlight the best option for the organization's manual data entry, select *Save*.


Select Duplicate Criteria
Ok
Cancel
LastName, FirstName
[None]
LastName
LastName AND SSN
LastName, First Initial of First Name
LastName, First Initial of First Name AND Addr1 AND Email
LastName, First Initial of First Name AND Email
LastName, First Initial of First Name AND SSN
LastName, First Initial of First Name OR Email OR SSN
LastName, First Initial of First Name OR SSN
LastName, FirstName
LastName, FirstName AND Addr1
LastName, FirstName AND Addr1 AND Email
LastName, FirstName AND Addr1 and SSN
LastName, FirstName AND Email

Logged Users

To see who is currently logged into the *iGreentree* system, select *Maintenance* | *Logged Users*.





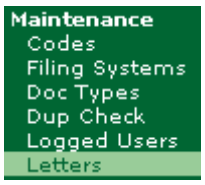
It is useful to know who is currently *Logged* into the iGreentree Application prior to performing certain administrative functions, such as system updates. If necessary, contact the appropriate User(s) to request they exit iGreentree using 'Exit | Exit Application.' Also, in having a limited number of concurrent Users, this is helpful to determine current login activity. For example, if a 6-User system currently has 6 Users logged in, one of the inactive Users (based on 'Last Access Date' can be contacted to logout, thereby allowing the 7th User to login when previously they were unsuccessful.

Users who do not select 'Exit | Exit Application' when logging out of the system, will remain on the *Logged Users* list for approximately 2 hours and will be automatically cleared at that time. If a User is known to have closed iGreentree, and their name still appears as a *Logged User,* highlight the name entry and select the *Logout* button to remotely log them out of the Application, thereby freeing up a system seat for another User login.

Letters

iGreentree utilizes *Letters* for many different functions and Actions throughout the system. Letters can be sent by a User as part of several Applicant, Applications, Hiring Manager, and Source Actions. In addition, the system can send letters automatically during the Requisition approval process or as an auto-response to Applicants.

To view all available *Letters*, select *Maintenance* | *Letters*.



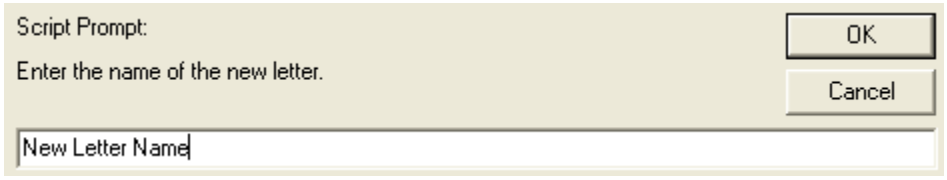
A list of *Letters* with the 'Letter Name,' 'Action,' and 'Add Contents To Letter History' values will display.

Letter Maintenance | Edit | Add | Delete | Copy | Save | Cancel | Close

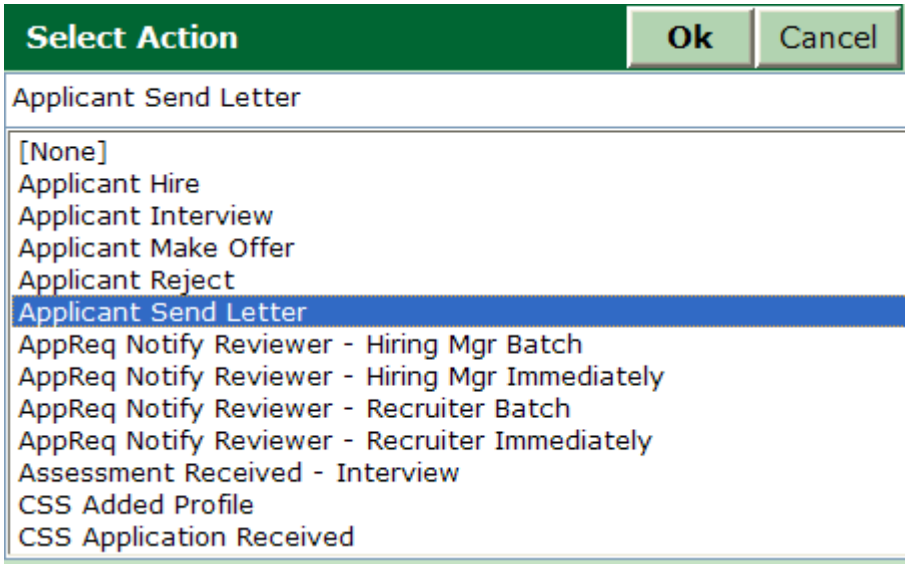
Action — Greentree Systems, Inc.

Letter Name	Action	Add Contents To Letter History	Send Anonymously
Assessment Interview result is available	Assessment Received - Interview	False	False
Assessment Interview Status Received	Assessment Received - Interview	True	False
CSS Added Profile	CSS Added Profile	False	False
CSS Application Received	CSS Application Received	False	False
CSS Application Received - Rejected	CSS Application Received but Rejected	False	False
CSS Email A Friend	CSS Email A Friend	False	False
CSS Email a Friend	CSS Email A Friend	False	False
CSS Job Alert	CSS Job Alert	False	False
CSS Job Alert Email	CSS Job Alert	False	False
CSS Send Password	CSS Send Password	False	False
CSS Send UserID and Password	CSS Send Password	False	False
CSS Thanks for Registering	CSS Added Profile	False	False
EOI Received	CSS EOI Received	True	False
EOI Received Assesment	CSS EOI Received - Assessment Notification	True	False
EOI Received but Rejected	CSS EOI Received but Rejected	True	False
Hire Confirmation	Applicant Hire	True	False
Hire Confirmation - Filled Req	Requisition Fill	True	False
HM Hiring Mgr has made an offer	Hiring Mgr Notify Recruiter Offer Made	False	False
HM Offer Made Notification	Hiring Mgr Notify Recruiter Offer Made	True	False
HM Req Approval Needed	Req Approval Review Request	False	False
HM Req Approval Note to Recruiter Req Approved	Req Approval Review Completed to Recruiter	False	False
HM Req Approval Note to Submitter	Req Approval Review Completed to HiringMgr	False	False
HM Req Approval Note to Submitter Interim	Req Approval Review Interim	False	False
HM Send Password	Hiring Mgr Send Password	False	False
Interview Confirmation	Applicant Interview	True	False
New Letter Name	Applicant Interview	True	False
Notify Hiring Manager of Applicant for Req	AppReq Notify Reviewer - Hiring Mgr Immedial	False	False
Notify Hiring Manager of Applicants for Req	AppReq Notify Reviewer - Hiring Mgr Batch	False	False
Notify of HR Backup	Hiring Mgr Send Letter	True	False
Notify Recruiter of Applicant for Req	AppReq Notify Reviewer - Recruiter Immediate	False	False
Notify Recruiter of Applicants for Req	AppReq Notify Reviewer - Recruiter Batch	False	False
Offer Exempt	Applicant Make Offer	True	False
Offer Exempt with Bonus	Applicant Make Offer	True	False
Offer Non-Exempt	Applicant Make Offer	True	False
Regrets	Applicant Reject	False	False

To add a new *Letter* click the Add button. A window will display, enter the name of the new *Letter* and select 'OK.'

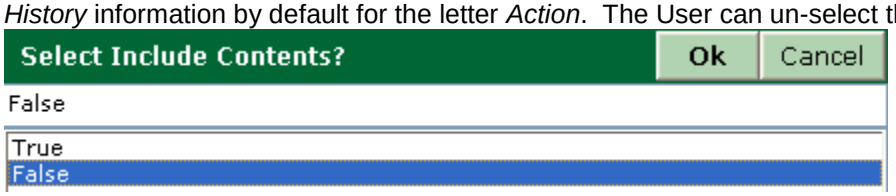


The next window displaying will set the *Action* to which this *Letter* should be associated with.



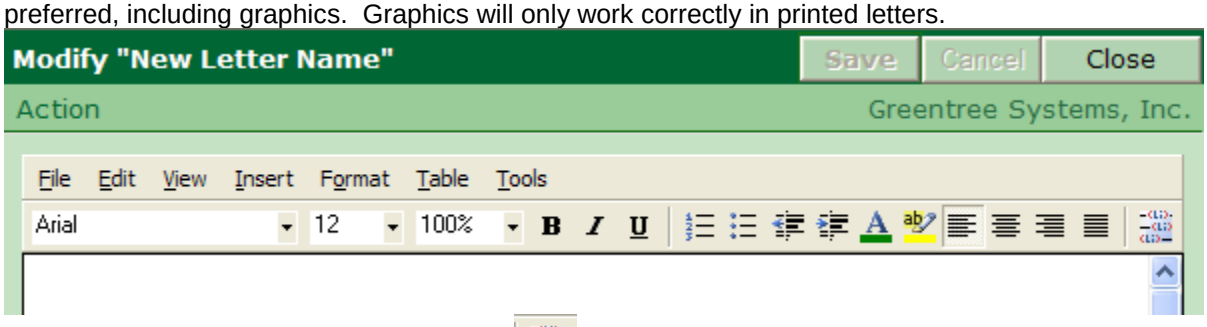
Applicant Send Letter Action *Letters* will also display as selections for the 'Mass Mailing' Applicant Action. NOTE: A letter can only be associated with one Action, should the same letter need to exist under two or more actions (i.e. Applicant Hire and Requisition Fill) you will need to add the letter twice (with two different names) and assign them to the different Actions. You can also use the Copy button for the 2nd letter to save time. Once added you can edit the name and Action associated with the letter by clicking in the appropriate column.

The final window is to select whether or not the actual letter contents should be saved as part of the *History* information by default for the letter *Action*. The User can un-select this when sending a letter.

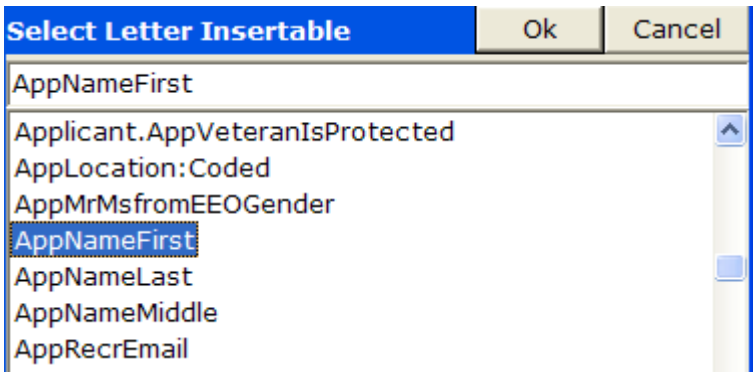


Once the new *Letter* has been added to the list it will appear with '***' in the Send Anonymously column. Click on ▼ and select *True* or *False* then click Save.

To add text to the letter, highlight the *Letter* and select the Edit button. The easiest way to create a new letter is to copy the text from an existing letter or other Application. If this is done, paste the text, otherwise, type the information into the text area. Letter text may include whatever formatting is preferred, including graphics. Graphics will only work correctly in printed letters.



To include data fields in the letter, click the button to *Select Letter Insertable Field.* Letter insert fields are iGreentree fields that will 'personalize' a letter based on the identified information for the Applicant, Application, Requisition, Hiring Manager, Source, and Recruiter.



The insertable field value will be placed where the cursor is positioned in the text before the field was picked. Select *OK* to add the insertable field. The insertable field appears in the text with << >> symbols surrounding the field name. For example:

Dear «AppNameFirst» «AppNameLast»,

Examples of Letter Insertable Fields are

- **AppMrMsfromEEOGender**: Refers to the EEO Attachment, Gender field. If the Gender is F, it will print Ms., M will print Mr. If U or blank, it will print <Unknown>.
- ***iCSSJobAlertSummaryBlock***: Refers to what Requisition information is emailed to Applicants who have set up Job Alerts. This Letter Insertable Field is defined in CSS Settings | Job Alert Fields.
- **iCSSReferralHREF**: Refers to the hyperlink of a Requisition that an Applicant has 'Sent to a Friend'
- **iCSSWelcomeHREF**: Refers to the web location of homepage for the CSS module.
- **HiringMgrHREF-ToApprover**: Refers to the hyperlink of a Requisition entered via Hiring Manager module that an Approver should use to review the Requisition during the approval process.
- **HiringMgrHREF-ToHiringMgr**: Refers to the hyperlink of a Requisition entered via Hiring Manager module that the Initiator should use to review the Requisition during the approval process.
- **HiringMgrHREF-ToNewSrchCommitteeMember**: Refers to the hyperlink of a Requisition entered via Hiring Mnager module that the New Search Committee Member should use to review the Requisition during the recruitment process.
- **HiringMgrHREF-ToRecruiter**: Refers to the hyperlink of a Requisition entered via Hiring Manager module that a Recruiter should use to review the Requisition during the approval process.
- **ReqApprovalStatusInfo**: Refers to the 'Status' of a Requisition as it is proceeding through the approval process.

IMPORTANT: Before deleting a letter, verify that iGreentree or any other module (CSS, Hiring Manager module, Resume Inboxes, or System) is not using the letter. If it is, change the settings before deleting the letter.

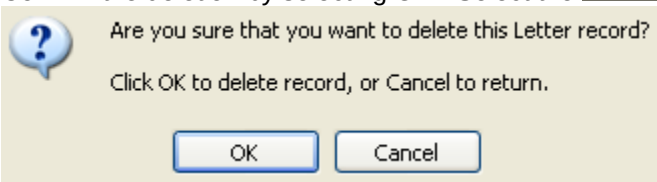
To find out if a letter is in use by CSS or the Hiring Manager, in iGreentree under *Maintenance* | *CSS Settings*, verify that the letter name does not appear anywhere in the '*Description'* column for all the properties listed.

To find out if a letter is in use by Resume Inboxes, in iGreentree under Maintenance | Resume Inboxes, verify that the letter name does not appear anywhere in the 'Description' column for all the Inbox Properties. Verify this for every inbox.

To find out if the letter is in use by the System, check in iGreentree under Maintenance | System Settings | AppReq Automated Rejects | AppReq Automated Reject Letter.

To delete a *Letter,* highlight the row containing the letter to be deleted and select the Delete button.

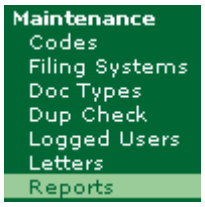
Confirm the deletion by selecting *OK.* Select the Save button to save this change.

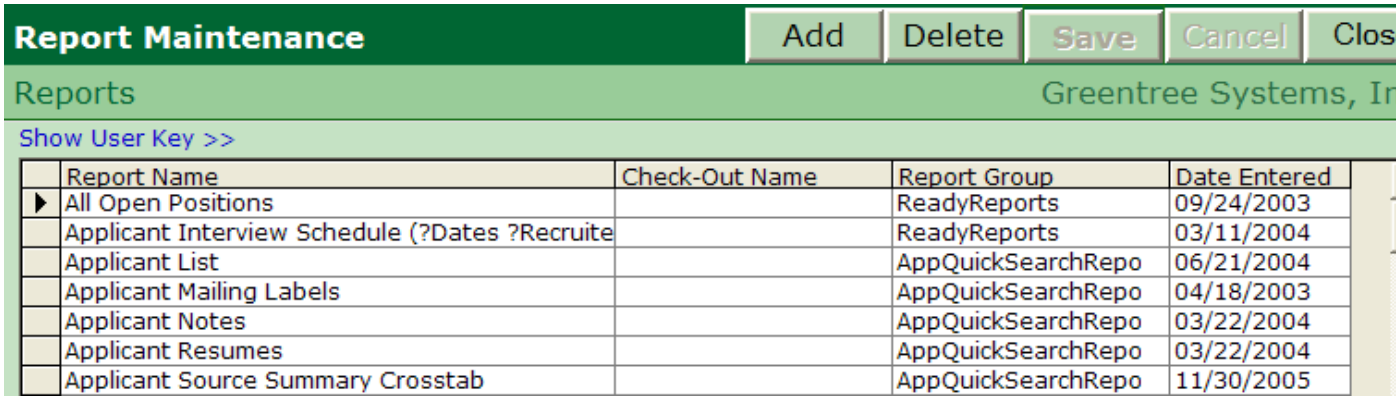


Reports

Reports are created and modified in Crystal Reports by the iGreentree Report Librarian (for more information see the *Using Crystal Reports with iGreentree* Manual).

Select *Maintenance* | *Reports*.





Add, Delete, and Save changes are options here as in other Maintenance windows.

Show User Key: *Displays/hides the currently logged User's key. The key can be used when creating and testing* search-dependent reports.

Report Name: Each report must have a unique name, describing the information in the report and/or how it is used. Reports with (?) as part of the Report Name will prompt the User to enter the requested information prior to running the Report.

Check-Out Name: This is the name of the User who has checked out the report for modification.

Report Group: This option determines where the report will be available within iGreentree.

Date Entered: This is the date the report was first introduced into your iGreentree System.

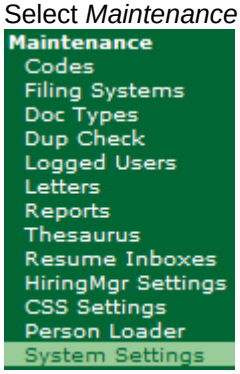
Person Loader

These settings are for use with the optional XML Person Loader module and are detailed in the documentation received with the implementation of the Person Loader. For more information regarding the Person Loader please contact Greentree Systems Support.

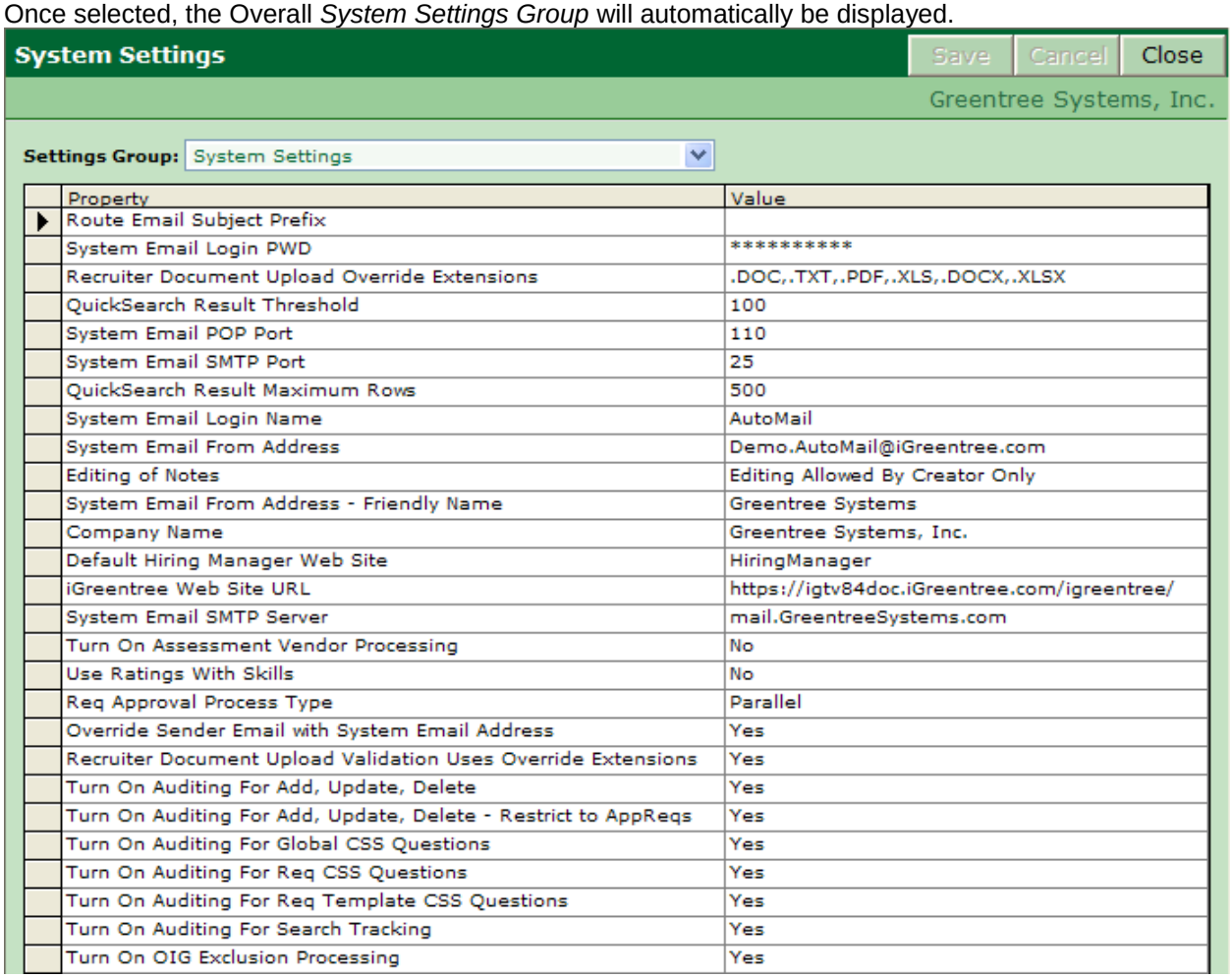
System Settings Maintenance

The System Settings contains numerous settings that the iGreentree Administrator can control.

Select *Maintenance* | *System Settings*.



Once selected, the Overall *System Settings Group* will automatically be displayed.



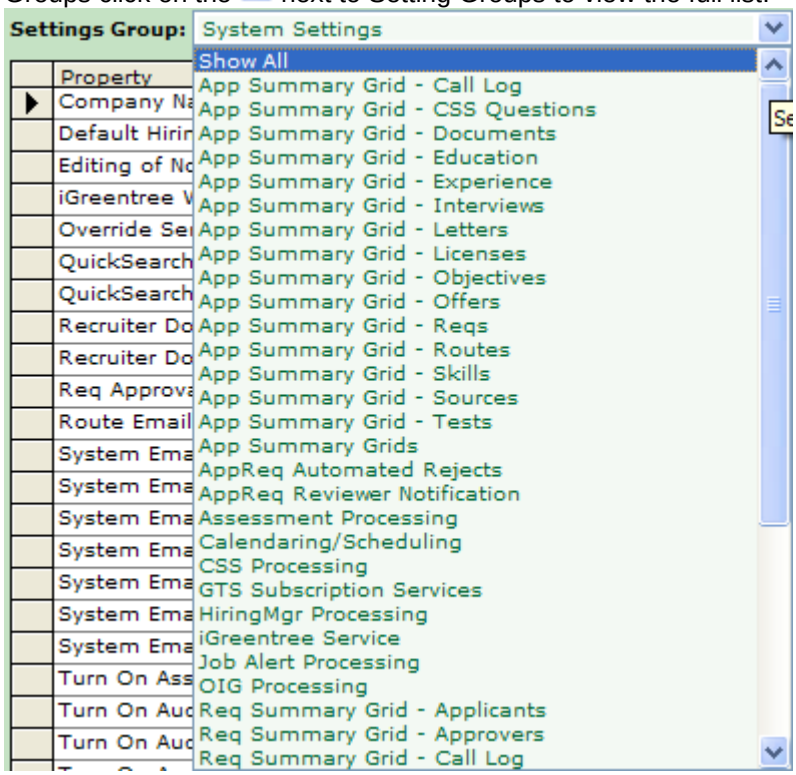
Property	Value
Route Email Subject Prefix	
System Email Login PWD	**********
Recruiter Document Upload Override Extensions	.DOC,.TXT,.PDF,.XLS,.DOCX,.XLSX
QuickSearch Result Threshold	100
System Email POP Port	110
System Email SMTP Port	25
QuickSearch Result Maximum Rows	500
System Email Login Name	AutoMail
System Email From Address	Demo.AutoMail@iGreentree.com
Editing of Notes	Editing Allowed By Creator Only
System Email From Address - Friendly Name	Greentree Systems
Company Name	Greentree Systems, Inc.
Default Hiring Manager Web Site	HiringManager
iGreentree Web Site URL	https://igtv84doc.iGreentree.com/igreentree/
System Email SMTP Server	mail.GreentreeSystems.com
Turn On Assessment Vendor Processing	No
Use Ratings With Skills	No
Req Approval Process Type	Parallel
Override Sender Email with System Email Address	Yes
Recruiter Document Upload Validation Uses Override Extensions	Yes
Turn On Auditing For Add, Update, Delete	Yes
Turn On Auditing For Add, Update, Delete - Restrict to AppReqs	Yes
Turn On Auditing For Global CSS Questions	Yes
Turn On Auditing For Req CSS Questions	Yes
Turn On Auditing For Req Template CSS Questions	Yes
Turn On Auditing For Search Tracking	Yes
Turn On OIG Exclusion Processing	Yes

Company Name: Refers to how you would like your company name to be referenced in various areas of

the system.
Default Hiring Manager Web Site: Refers to the Name of your Hiring Manager website in Reviewer Notification messages.
Editing of Notes: Controls who is allowed to edit Notes after their initial creation.
iGreentree Website URL: Displays the active URL for your iGreentree System to be used in App/Req reviewer notification.
Override Sender Email with System Email Address: Allows you to mask the email address used for communication with an alternate than the logged in User.
QuickSearch Result Maximum Rows: Refers to the maximum number of records the system will return when a QuickSearch is performed. For example, if 1000 records match the QuickSearch criteria only the first 500 records will be returned if this value is set to 500. Greentree recommends a value of 500.
QuickSearch Result Threshold: Refers to the number of records that will be returned when a QuickSearch is performed without a warning window displaying letting the User know the number of records that meet the criteria. Greentree Systems recommends a value of 100.
Recruiter Document Upload Override Extensions: file extensions of documents that Users are allowed to upload in iGreentree to the Applicant or Requisition document list.
Recruiter Documentation Upload Validation Uses Override Extensions: indicates whether Users can upload any file with an extension specified in the list above or if they must use a file with an extension that matches the document type selected when they do the upload.
Req Approval Process Type: Refers to the type of Requisition approval process utilized when a Requisition is entered via Hiring Manager module. The two options are 'Parallel' and 'Serial.' Refer to Hiring Manager Module Maintenance for more information.
Route Email Subject Prefix: Allows you to determine the prefix in the subject line of a route.
System Email From Address: Refers to the email address that will populate the 'From' field on system generated emails. This email address will be utilized during the Requisition approval process and auto-response emails. Typically a generic, send-only email address is created for this purpose.
System Email From Address – Friendly Name: displayed on the From line of emails automatically sent by the system.
System Email Login Name: Refers to the email login name for the 'System Email From Address' setting notated above. In the above example the login name would be 'AutoMail.'
System Email Login PWD: Refers to the email password for the 'System Email From Address' setting notated above.
System Email POP Port: Refers to the port utilized by incoming email messages.
System Email SMTP Port: Refers to the port utilized by outbound email messages.
System Email SMTP Server: Refers to the name of the mail server utilized for outbound email messages.
Turn On Assessment Vendor Processing: Currently not activated for all customers. Please contact Greentree Systems Support for more information.
Turn On Auditing for Add, Update, Delete: Defines whether or not the system should log Add, Update and Delete changes by each User.
Turn On Auditing for Add, Update, Delete – Restrict to AppReqs: If the Turn On Auditing for Add, Update, Delete option is YES, then setting this option to YES limits the auditing to Applications only. The primary use of this feature is to audit Result code changes.
Turn On Auditing For Global CSS Questions: Defines whether or not the system should log additions, deletions, and changes made to Global CSS Questions. Greentree recommends this set to 'Yes.'
Turn On Auditing For Req CSS Questions: Defines whether or not the system should log additions, deletions, and changes made to Requisition specific CSS Questions. Greentree recommends this to be set to 'Yes.'
Turn On Auditing For Req Template CSS Questions: Defines whether or not the system should log additions, deletions, and changes made to a Requisition template in regards to Requisition specific CSS Questions. Greentree recommends this to be set to 'Yes.'
Turn on Auditing For Search Tracking: Defines whether or not the system should log information regarding who was searching for information.
Turn On OIG Exclusion Processing: Will automatically exclude any Applicant from consideration that has an OIG Status of 'Excluded'.

Use Ratings With Skills: Refers to whether or not the ability to rate Applicant Skills is available. Altering this setting will not impact stored data.

There are several different Settings Groups that can be maintained by your Organization, to view other Groups click on the next to Setting Groups to view the full list.

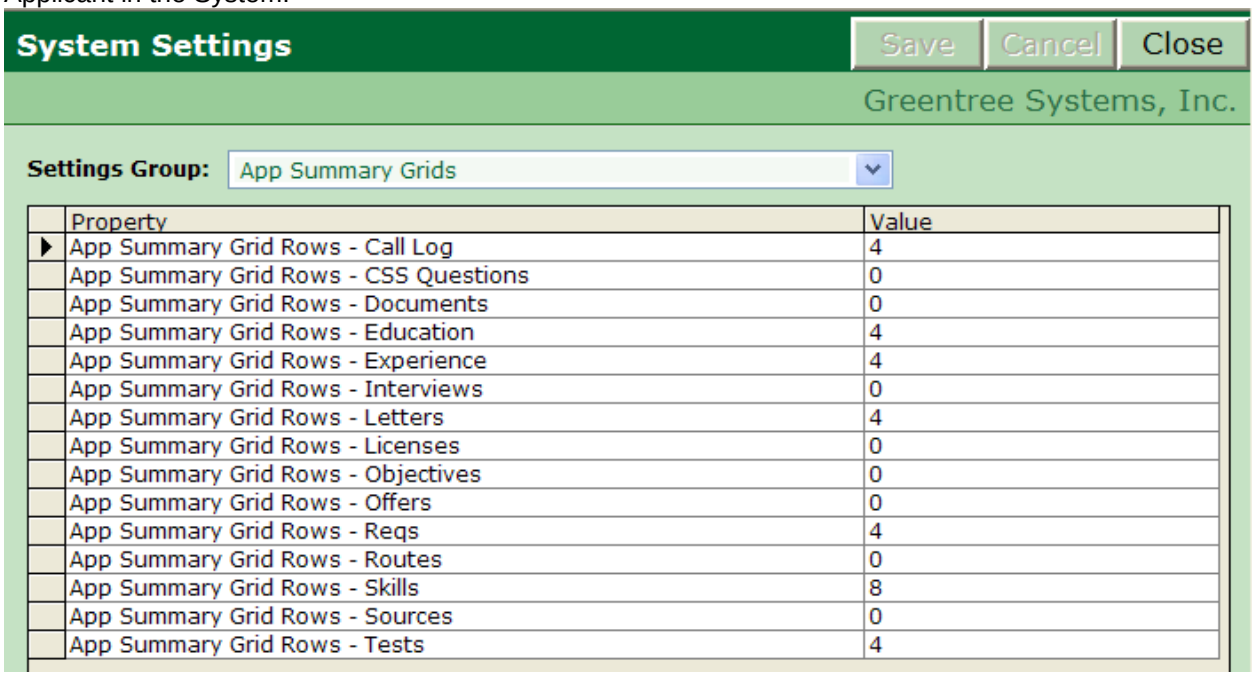


Show All

This option will display all System Settings that can be controlled here in alphabetical order. These options will all be discussed further below, in their group section.

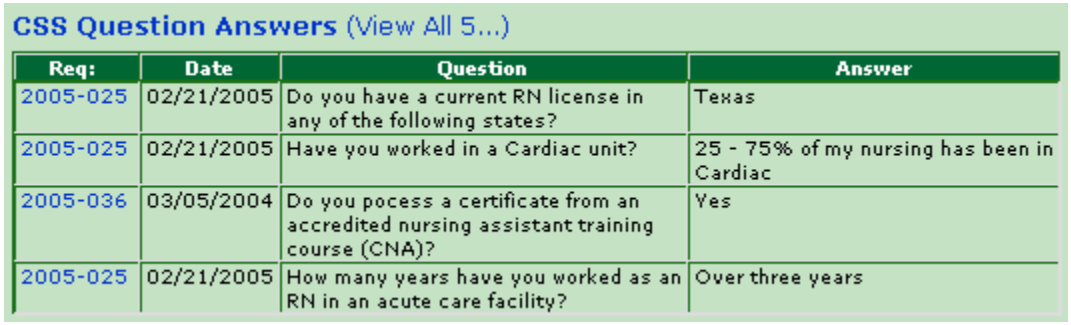
App Summary Grids

The Summary Grids refers to the Summary View of an Applicant (see Applicant Processing for more information on Summary View). This Settings Group controls the layout of the Summary View of any Applicant in the System.



Property	Value
App Summary Grid Rows - Call Log	4
App Summary Grid Rows - CSS Questions	0
App Summary Grid Rows - Documents	0
App Summary Grid Rows - Education	4
App Summary Grid Rows - Experience	4
App Summary Grid Rows - Interviews	0
App Summary Grid Rows - Letters	4
App Summary Grid Rows - Licenses	0
App Summary Grid Rows - Objectives	0
App Summary Grid Rows - Offers	0
App Summary Grid Rows - Reqs	4
App Summary Grid Rows - Routes	0
App Summary Grid Rows - Skills	8
App Summary Grid Rows - Sources	0
App Summary Grid Rows - Tests	4

The Property column refers to the item(s) that can be displayed on the main screen (both Attachments and History). The Value column refers to the number of rows to be displayed if the Property exists. For example, the value of CSS Questions is set to 4, if an Applicant has answered CSS Questions (when applying via CSS) the 4 most recent questions will be displayed in Summary View. If the Applicants record does not have any CSS Question Answers associated to them then the grid will state No Information Available.



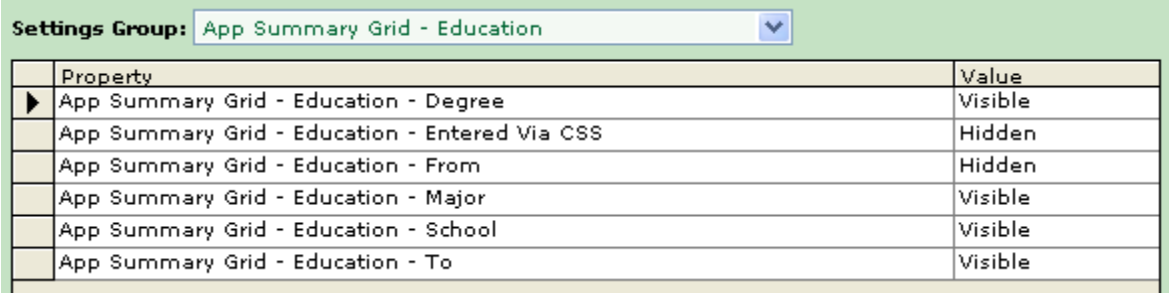
Req:	Date	Question	Answer
2005-025	02/21/2005	Do you have a current RN license in any of the following states?	Texas
2005-025	02/21/2005	Have you worked in a Cardiac unit?	25 - 75% of my nursing has been in Cardiac
2005-036	03/05/2004	Do you pocess a certificate from an accredited nursing assistant training course (CNA)?	Yes
2005-025	02/21/2005	How many years have you worked as an RN in an acute care facility?	Over three years

If certain information is not desired on the Summary View than the Value should be set to 0.

App Summary Grid – Details

There are several Summary Grid Sub Sections that can be controlled individually here; *Call Log, CSS Questions, Documents, Education, Experience, Interviews, Letters, Licenses, Objectives, Offers, Reqs, Routes, Skills, Sources* and *Tests.* Each of these sub sections operates identically and can be used to control the information displayed within the specific Summary Grid.

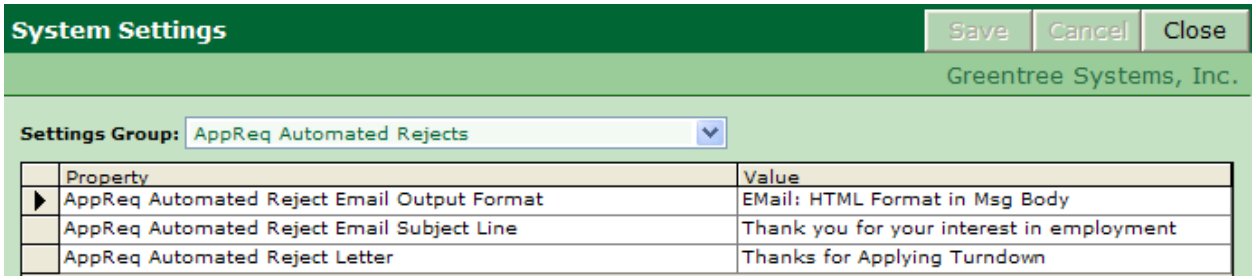
For Example, the *App Summary Grid – Education* controls *Degree, From, To, Major, School* and *Entered Via CSS* fields.



If this information is to be displayed (under *Education* in the *Summary View*) then the *Value* should be set to *Visible*. If the information is not to be displayed then the *Value* should be set to *Hidden.* To change a value click in the value column, a button will appear. Click on this button and choose the appropriate value.

AppReq Automated Rejects

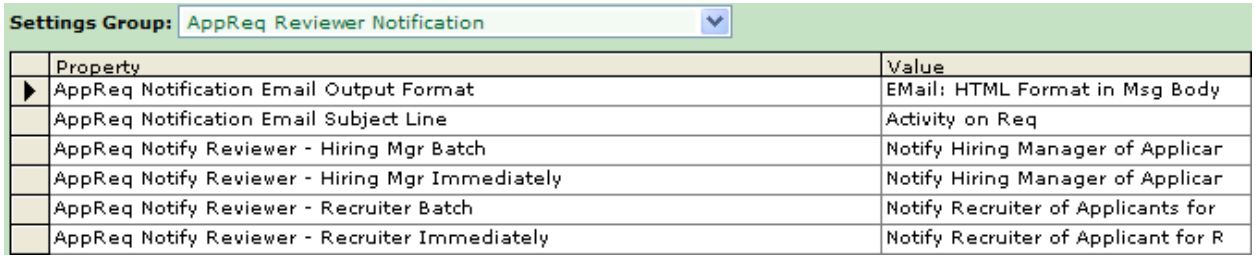
This group of system settings allow you to control the settings associated with the automated reject email notification.



AppReq Automated Reject Email Output Format – specifies the format of the automated reject email.
AppReq Automated Reject Email Subject Line – specifies the text to appear in the subject line of the automated reject email.
AppReq Automated Reject Email Reject Letter – specifies the letter to be sent when the automated reject email is generated.

AppReq Reviewer Notification

This group allows you to control the settings associated with the Reviewer Notification functionality in iGreentree.


Settings Group: AppReq Reviewer Notification
Property
Value
AppReq Notification Email Output Format
EMail: HTML Format in Msg Body
AppReq Notification Email Subject Line
Activity on Req
AppReq Notify Reviewer - Hiring Mgr Batch
Notify Hiring Manager of Applicar
AppReq Notify Reviewer - Hiring Mgr Immediately
Notify Hiring Manager of Applicar
AppReq Notify Reviewer - Recruiter Batch
Notify Recruiter of Applicants for
AppReq Notify Reviewer - Recruiter Immediately
Notify Recruiter of Applicant for R

AppReq Notification Email Output Format: Defines the type of email Hiring Manager/Recruiter will receive when a specific result has been acheived.
AppReq Notification Email Subject Line: This is where you can control the content of the subject line in the above email.
AppReq Notify Reviewer – Hiring Mgr Batch: This setting identifies the letter which will be emailed to Hiring Managers, notifying them of Applicant activity on their Requisitions.
AppReq Notify Reviewer – Hiring Manager Immediately: This setting identifies the letter which will be immediately emailed to Hiring Managers notifying them of an Applicant.

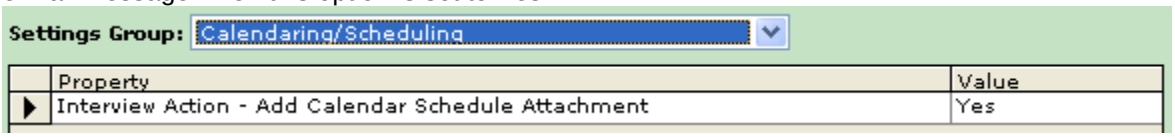
AppReq Notify Reviewer – Recruiter Batch: This setting identifies the letter which will be emailed to Recruiters, notifying them of Applicant activity on their Requisitions.
AppReq Notify Reviewer – Recruiter Immediately: This setting identifies the letter which will be immediately emailed to Recruiters notifying them of an Applicant.

Assessment Processing

This Settings Group is used to support interfaces for testing and assessment vendors. This feature is currently not activated for all customers. Please contact Greentree Systems Support for more information.

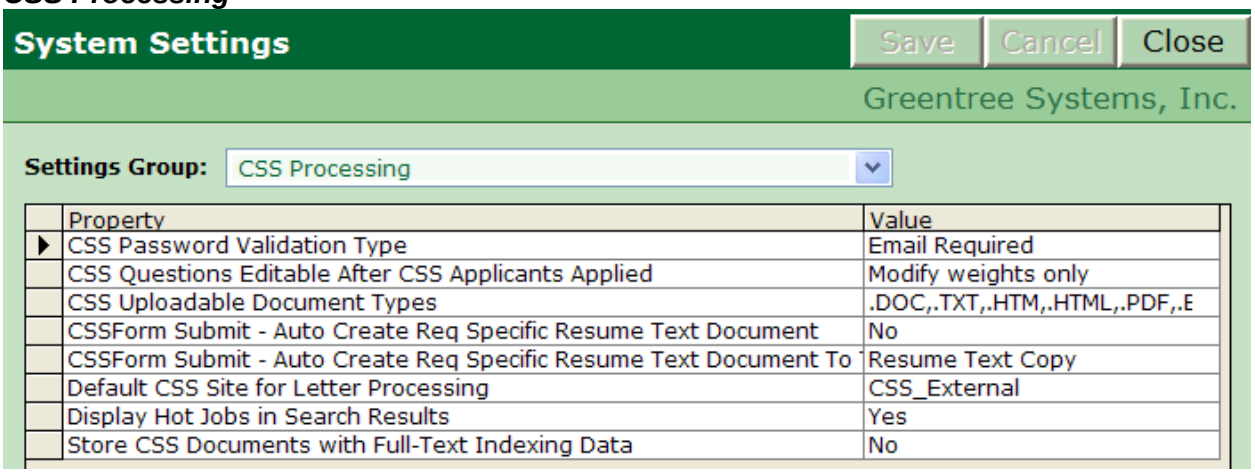
Calendaring/Scheduling

The Calendaring/Scheduling setting allows you to automatically attach an appointment calendar file to the e-mail message when this option is set to Yes.



The attached file has a .VCS extension, and in Microsoft Outlook, if you double-click (or open) the attachment, it will try to add the interview appointment to your Outlook Calendar.

CSS Processing



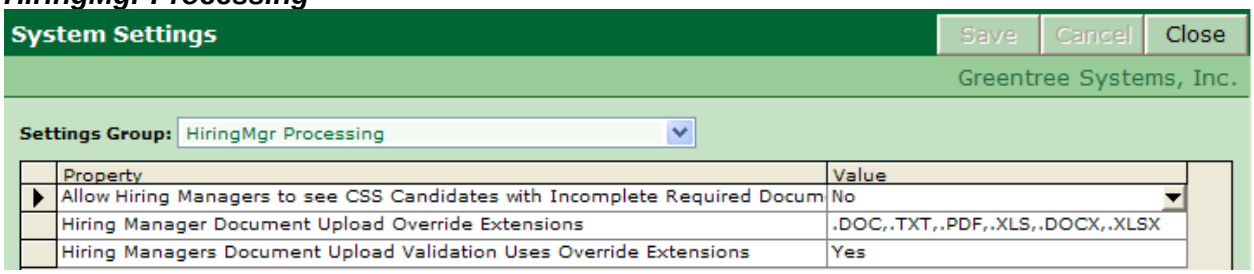
CSS Password Validation Type: Refers to the type of validation to be utilized by the Candidate Self-Service (CSS) module when an Applicant logs into the system. The two options are: 'Email Required' and 'Email Not Required.' The latter is recommended if there is any doubt as to whether or not all Applicants would have an email account.
CSS Questions Editable After CSS Applicants Applied: Refers to whether or not Req specific pre-screening questions may be edited after Applicants have been logged to the Requisition. The three options are: 'Do not modify questions or weights,' 'Modify questions and weights,' and 'Modify weights only.'
CSS Uploadable Document Types: Refers to which Types of Documents are allowed to be uploaded from your CSS Site
CSSForm Submit – Auto Create Req Specific Resume Text Document: Refers to when an Applicant applies via CSS but does not include a Resume Text with their Application. If the Setting is set to Yes, then the system will take the most recent Resume Text and make a copy, associating it with the Requisition so the HM may view it thru the module.

CSSForm Submit – Auto Create Req Specific Resume Text Document To Type: Refers to the above setting, if Yes is chosen then this is where we decide what format the newly copied Resume Text should be created in.
Default CSS Site for Letter Processing: Refers to which CSS Site (some organizations may have more than one) you are most likely to want to reference in communication that may be sent from your iGreentree System.
Display Hot Jobs in Search Results: If set to YES, all Requisitions with a Status code marked with IsHotJob=YES will be displayed with the *HotJobs* indicator.
Store CSS Documents with Full-Text Indexing Data: If set to YES, all CSSForm applications will be included in the full-text catalog and can be searched using the 'contains' search field. This setting does not apply to CSS Uploadable documents.

GTS Subscription Services

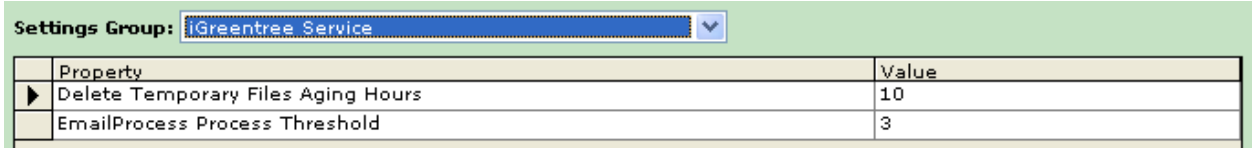
This is where login/password information is stored if using services provided by Greentree Systems, Inc. This area should not be modified without instruction from Greentree personnel. Changing this information may result in services malfunctioning.

HiringMgr Processing



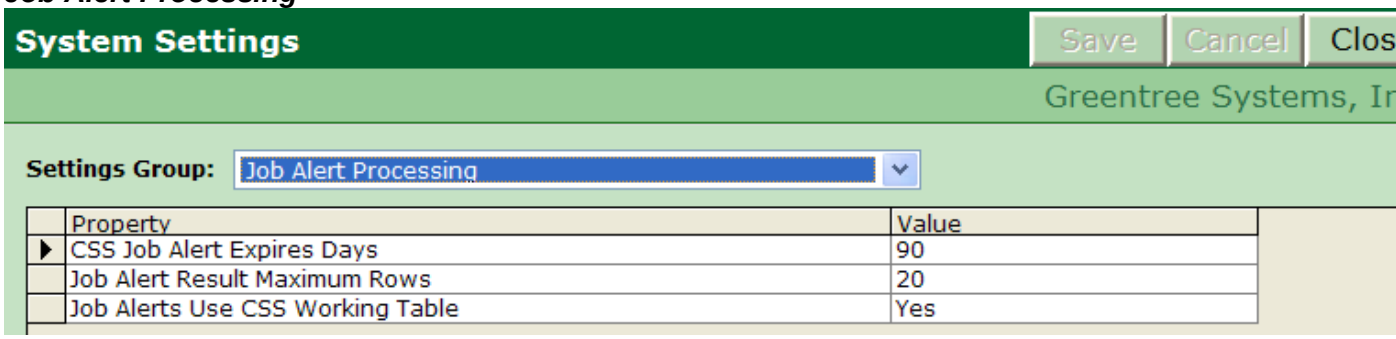
Allow Hiring Managers to see CSS Candidates with Incomplete Required Documents: You can allow your Hiring Managers to view CSS Applicants that do not have all the required documentation uploaded for the specific requisition for which they have applied. To allow, change value to Yes.
Hiring Manager Document Upload Override Extensions: In the Hiring Manager Module, this is the list of file extensions that are permitted to be uploaded for a Requisition or Applicant.
Hiring Managers Document Upload Validation Uses Override Extentions: If this is set to YES, the system will allow any of the file extensions specified in the above list.

iGreentree Service



Delete Temporary Files Aging Hours: Several functions in the iGreentree System create temporary files on your server. This setting determines how long those files are saved before deletion. Greentree recommends deleting these files on a daily basis, therefore 10 hours is the standard recommendation.
EmailProcess Process Threshold: Refers to the number of emails processed per pickup from a Resume Inbox. For example, if the service is configured to poll the mailboxes once per minute, it would process the next 3 emails on each pass, or a maximum of 3 per minute. This is to prevent overloading the email server. Greentree Systems recommends a value of 3. System performance will be negatively impacted when the threshold is set higher.

Job Alert Processing



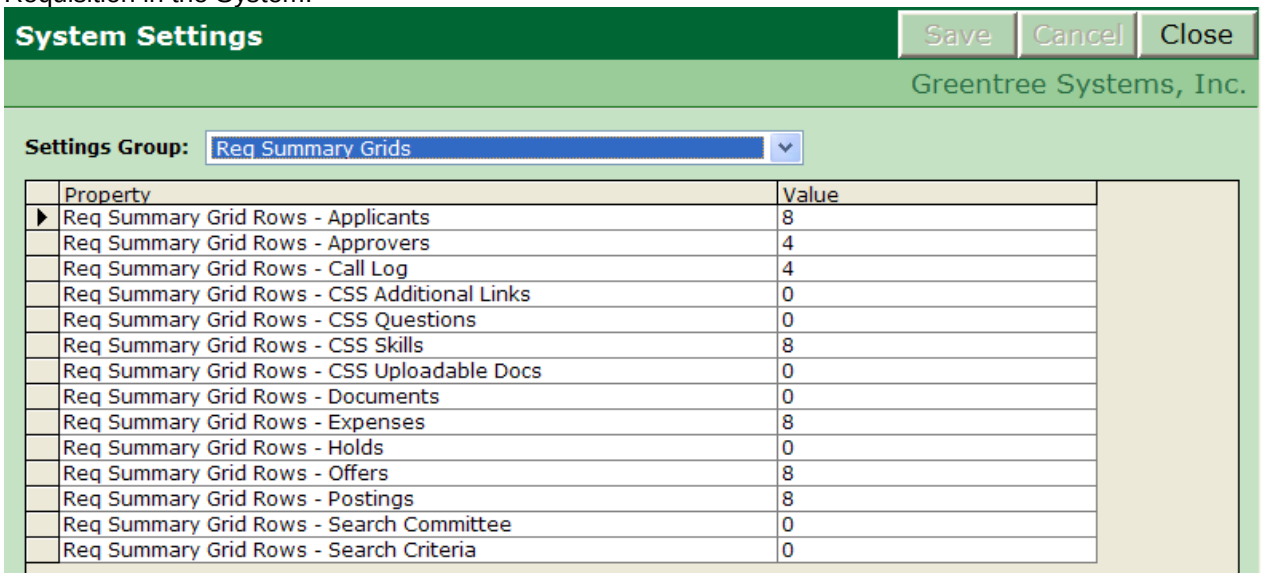
CSS Job Alert Expires Days: This allows you to control how long, in days, an Applicants CSS Job Alerts will remain active without any activity. Activity qualifies as modifying, logging into the CSS Site, etc.
Job Alert Result Maximum Rows: This allows you to control how many positions an Applicant will be able to view in their Job Alerts email.
Job Alerts Use CSS Working Table: This option should always be set to YES.

OIG Processing

The OIG Processing settings are set up only if your organization subscribes to Greentree's OIG Processing Service. These settings were defined upon implementation of your system and should not be modified without consulting Greentree Systems for more information.

Req Summary Grids

The Summary Grids refers to the Summary View of a Requisition (see Requisition Management for more information on Summary View). This Settings Group controls the layout of the Summary View of any Requisition in the System.



The Property column refers to the item(s) that can be displayed on the main screen (both Attachments and History). The Value column refers to the number of rows to be displayed if the Property exists. If information is not desired on the Summary View than the Value should be set to 0.

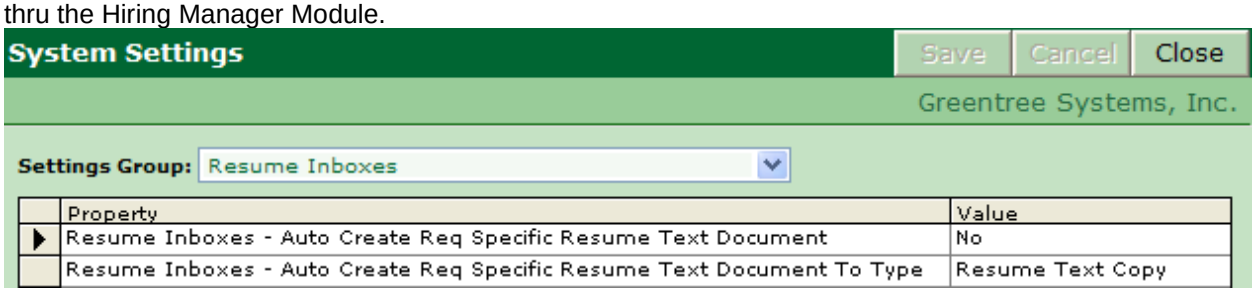
Req Summary Grid – Details

There are several Summary Grid Sub Sections that can be controlled individually here; Applicants, Approvers, Call Log, CSS Additional Links, CSS Questions, CSS Skills, CSS Uploadable Docs,

Documents, Expenses, Holds, Offers, Postings, Search Committee and Search Criteria. Each of these sub sections operates identically and can be used to control the information displayed within the specific Summary Grid. For an example please refer to App Summary Grid – Details for more information.

Resume Inboxes

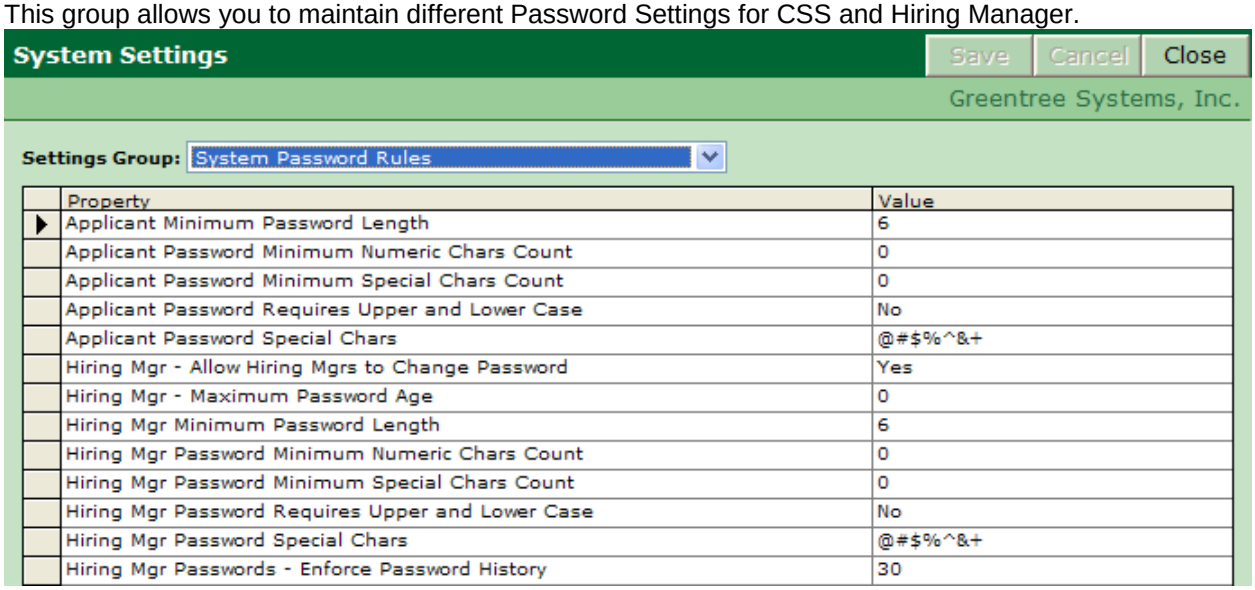
If your organization receives Applications from a job board via email and if there is one or more Requisitions on the subject line, then these settings are for you! If the Auto Create Req Specific Resume Text Document is set to a value of Yes then in addition to logging the Applicant to each Requisition the system will also make a copy of the Resume Text document as Resume Text Copy and associate the req number with the copy. This will allow Hiring Managers to view the Resume Text information submitted thru the Hiring Manager Module.



Property	Value
Resume Inboxes - Auto Create Req Specific Resume Text Document	No
Resume Inboxes - Auto Create Req Specific Resume Text Document To Type	Resume Text Copy

System Password Rules

This group allows you to maintain different Password Settings for CSS and Hiring Manager.



Property	Value
Applicant Minimum Password Length	6
Applicant Password Minimum Numeric Chars Count	0
Applicant Password Minimum Special Chars Count	0
Applicant Password Requires Upper and Lower Case	No
Applicant Password Special Chars	@#$%^&+
Hiring Mgr - Allow Hiring Mgrs to Change Password	Yes
Hiring Mgr - Maximum Password Age	0
Hiring Mgr Minimum Password Length	6
Hiring Mgr Password Minimum Numeric Chars Count	0
Hiring Mgr Password Minimum Special Chars Count	0
Hiring Mgr Password Requires Upper and Lower Case	No
Hiring Mgr Password Special Chars	@#$%^&+
Hiring Mgr Passwords - Enforce Password History	30

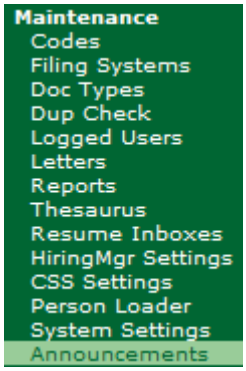
Applicant Minimum Password Length: Defines the necessary length for an Applicant's CSS Password.
Applicant Password Minimum Numeric Chars Count: Defines the number of Numeric Characters required in an Applicants CSS Password.
Applicant Password Minimum Special Chars Count: Defines the number of Special Characters (defined later) required in an Applicants CSS Password.
Applicant Password Requires Upper and Lower Case: Here you can determine if an Applicant's CSS Password needs to have both upper and lower case characters included.
Applicant Password Special Chars: Allows you to define what you consider Special Characters for the CSS Password field.
Hiring Mgr Minimum Password Length: Defines the necessary length for a Hiring Manager's password in the HM Module.
Hiring Mgr Password Minimum Numeric Chars Count: Defines the number of Numeric Characters required in a Hiring Manager's password.

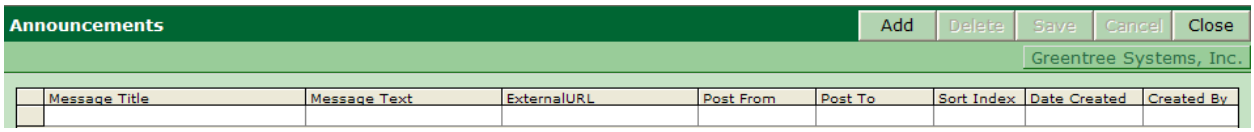
Hiring Mgr Password Minimum Special Chars Count: Defines the number of Special Characters (defined later) required in a Hiring Manager's password.
Hiring Mgr Password Requires Upper and Lower Case: Here you can determine if a Hiring Manager's password needs to have both upper and lower case characters included.
Hiring Mgr Password Special Chars: Allows you to define what you consider Special Characters for the Hiring Manager password field.
Hiring Mgr Passwords – Enforce Password History: Specifies the number of unique passwords that must be used before a password can be reused. A zero means it is not enforced.
Hiring Mgr – Allow Hiring Mgrs to Change Password: If set to YES, Hiring Managers will be permitted to change their password in the Hiring Manager Module.
Hiring Mgr – Maximum Password Age: Specifies the number of days before a Hiring Manager is forced to change their password. A zero means there is no time limit.

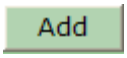
Announcements

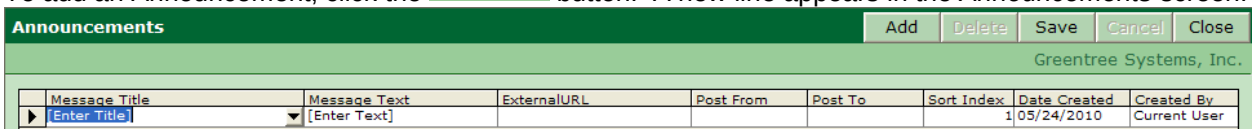
This area allows the User to add, delete and modify the Announcements displayed on the Dashboard when the User first logs into the iGreentree module.

Select *Maintenance* | *Announcements.*



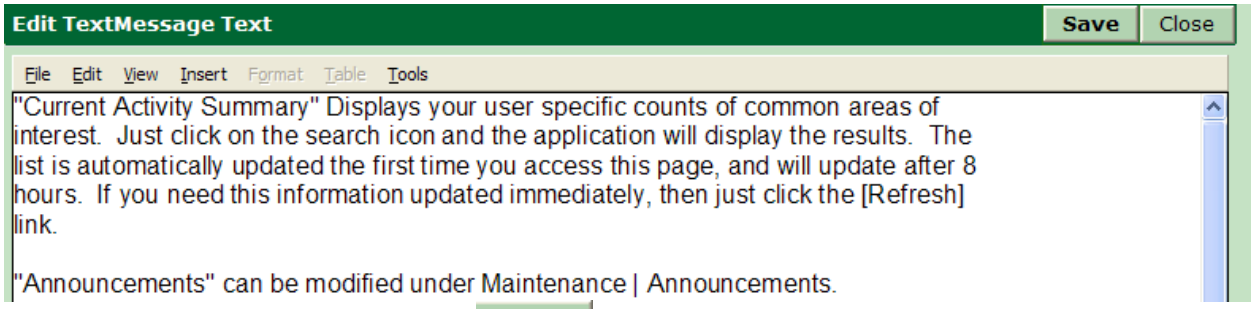


To add an Announcement, click the  button. A new line appears in the *Announcements* screen.



Click in the *Message Title* field and begin typing the title of your Announcement. Then, click in the *Message Text* field and type in the *Message Text*.

NOTE: When the User clicks in either the *Message Title* or *Message Text* fields, the  button appears. Clicking this button will bring up the editor and allows the User to view and edit the entire text without it scrolling out of the field. It also gives the User the ability to perform a *SpellCheck* on the text before saving it, if desired.


Edit TextMessage Text
Save
Close
File Edit View Insert Format Table Tools
"Current Activity Summary" Displays your user specific counts of common areas of interest. Just click on the search icon and the application will display the results. The list is automatically updated the first time you access this page, and will update after 8 hours. If you need this information updated immediately, then just click the [Refresh] link.
"Announcements" can be modified under Maintenance | Announcements.

If the editor is used, the User must click **Save** before exiting the editor to save any text changes that were made.

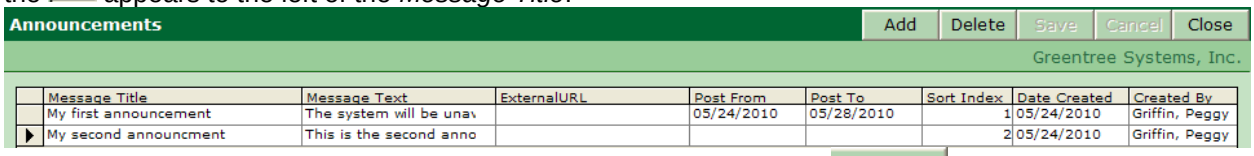
To specify a date range in which the Announcement should be displayed, click in the *Post From* field. When the button appears, click on it to bring up a calendar from which to select a starting date. Click **Ok** to return to the Announcements screen. Repeat these steps for the *Post To* field. If no dates are specified, the Announcement is displayed immediately for an indefinite period of time.

To specify a link to a web page containing additional information related to the Announcement, place the link in the ExternalURL field. When the Announcement is displayed, the Message Text will be followed by More... which will be a link to the specified web page.

When all changes are completed, click **Save** on the Announcement screen then click **Close** to exit *Maintenance* | *Announcements*.

To add additional Announcements, repeat the steps described above.

To edit an existing Announcement, click on the line associated with the desired Announcement so that the appears to the left of the *Message Title*.


Announcements
Add
Delete
Save
Cancel
Close
Greentree Systems, Inc.
Message Title | Message Text | ExternalURL | Post From | Post To | Sort Index | Date Created | Created By
My first announcement | The system will be unav | | 05/24/2010 | 05/28/2010 | 1 | 05/24/2010 | Griffin, Peggy
My second announcment | This is the second anno | | | | 2 | 05/24/2010 | Griffin, Peggy

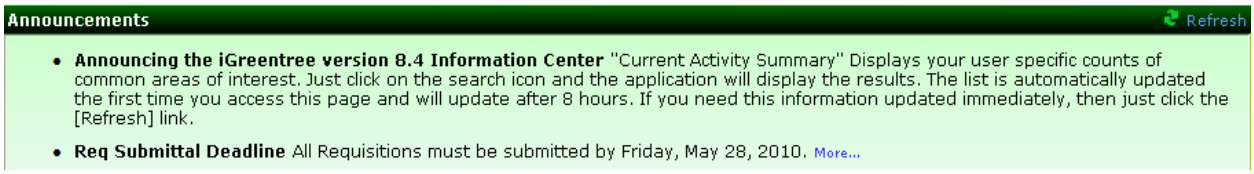
Modify the desired fields associated with the Announcement and click **Save**.

To delete an Announcement, click on the line associated with the Announcement so that the appears to the left of the *Message Title*. Click **Delete** followed by **Save** to save the changes.

NOTE: When multiple Announcements are present, the order they appear in the Announcements screen can be changed by changing their respective *Sort Index*. The lowest number appears first (on top) and can start as low as zero. The numbers do not need to be sequential.


Announcements
Add
Delete
Save
Cancel
Close
Greentree Systems, Inc.
Message Title | Message Text | ExternalURL | Post From | Post To | Sort Index | Date Created | Created
Announcing the iGreentree versic | "Current Activity Summa | | 05/24/2010 | 05/28/2010 | 1 | 05/24/2010 | Griffin,
Req Submittal Deadline | All Requisitions must be | http://www.greentreesys | | | 5 | 05/24/2010 | Griffin,

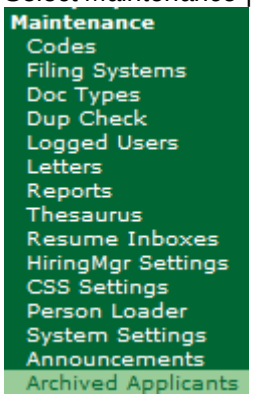
The following is an example of multiple announcements with the second Announcement using the *ExternalURL* field.


Announcements
Refresh
Announcing the iGreentree version 8.4 Information Center "Current Activity Summary" Displays your user specific counts of common areas of interest. Just click on the search icon and the application will display the results. The list is automatically updated the first time you access this page and will update after 8 hours. If you need this information updated immediately, then just click the [Refresh] link.
Req Submittal Deadline All Requisitions must be submitted by Friday, May 28, 2010. More...

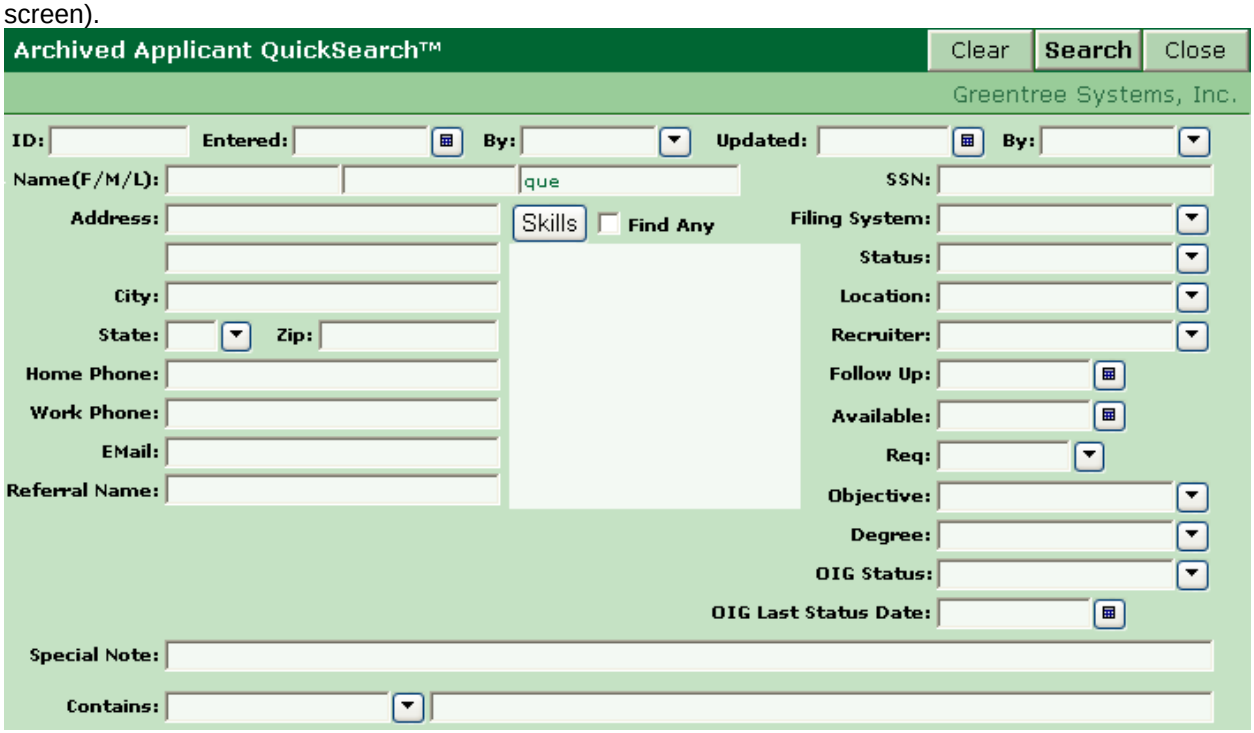
Archived Applicants

Archiving marks a person's record as archived. This means the person will no longer show up on any selection list and won't be found on any search results. The *Archived Applicants* area allows you to search on archived Applicants, to view main screen information (no Attachments, History, etc), restore the Applicants, or permanently delete them from the system.

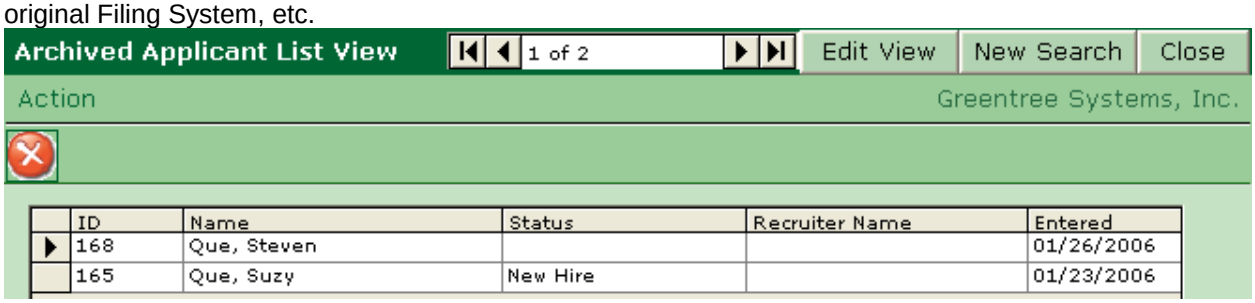
Select *Maintenance* | *Archived Applicants*



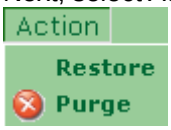
An Archived Applicants QuickSearch screen will appear (similar to normal Applicant QuickSearch screen).



Enter the desired search parameters and click *Search.* To view main screen information click *Edit View*. To restore, make sure the list of Applicants is accurate. ALL Applicants listed will be restored to their original Filing System, etc.



Next, select *Action* | *Restore*



The System will prompt twice to verify that the Applicants should really be restored, click *OK* to continue.

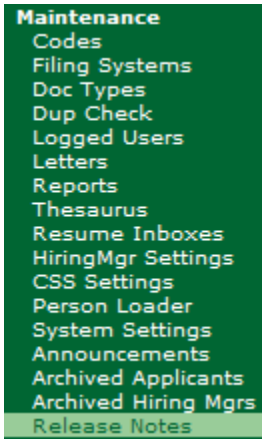
To permanently Purge the Applicants from your system select, *Action* | *Purge* or use the quick launch button  located on the toolbar. The System will once again prompt twice to verify that the Applicants should be permanently removed. Click *OK* to continue.

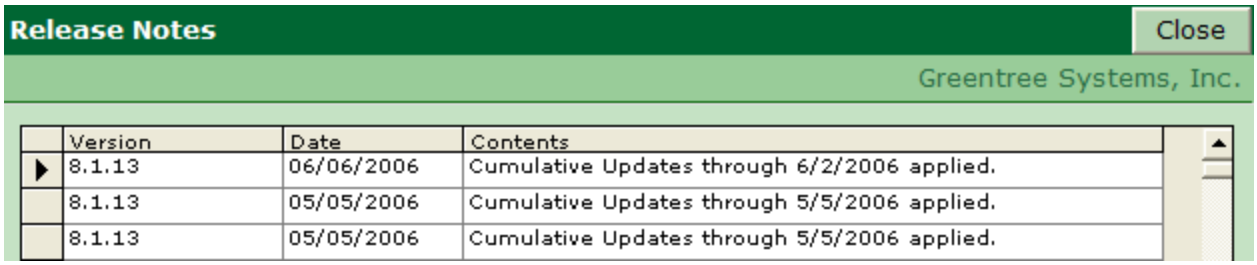
NOTE: Purging Archived Applicants from the System cannot be undone.

Archived Hiring Mgrs

This area allows you to search on archived Hiring Managers, view main screen information (no Attachments, History, etc), restore the Applicants, or permanently delete from the system. For more detailed information on searching, restoring and purging please see above.

Release Notes





The *Release Notes* from the main Maintenance menu allows an organization to view enhancements made to the iGreentree version that is in use. There is no maintenance required.

Module Maintenance

Maintenance topics relating to iGreentree Modules can be reviewed in the Module Maintenance chapter. The Maintenance menu items found in the chapter include Thesaurus, Resume Inboxes, HiringMgr Settings and CSS Settings.

Administrator Mass Actions

Apply Template

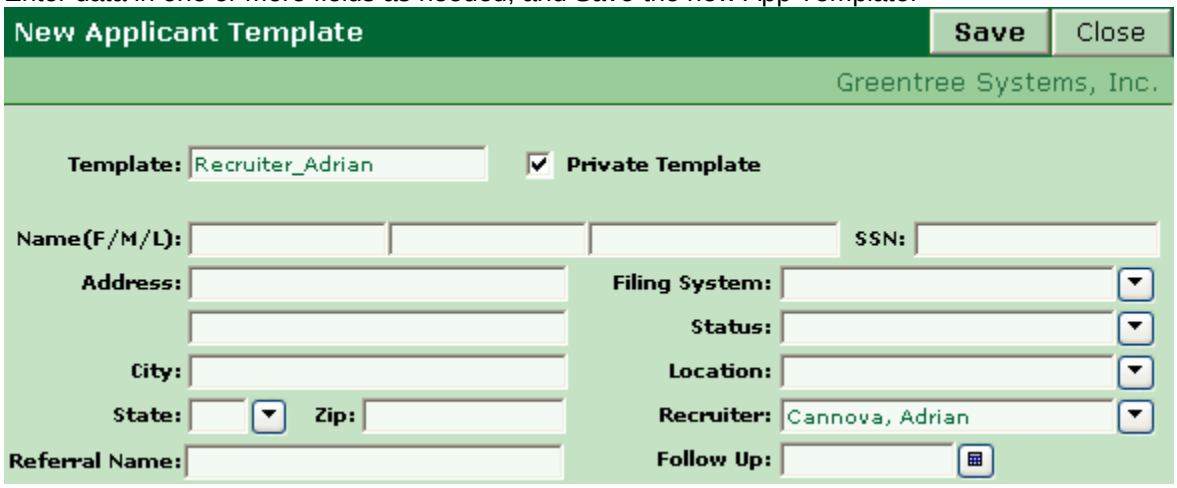
This action is available for both *Applicants* and *Requisitions*, from the *List View*. It is used to change all the same field(s) for a group of records at one time. Only fields populated on the Template will be affected on live records.

***Example**:* A new recruiter was just hired who will specialize in recruiting for Programmer positions and needs to have all of these future Applicants assigned to them.

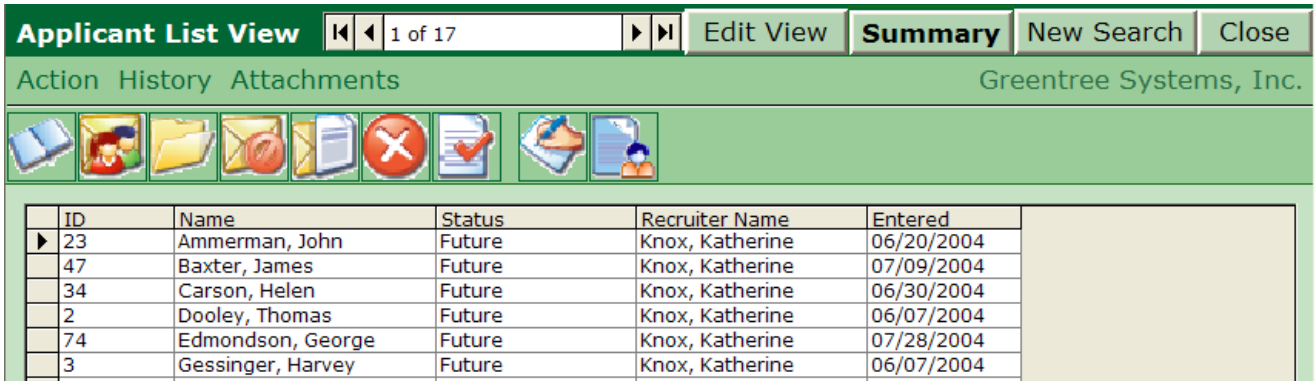
First, create the *App Template* to use. Select *App Templates* | *Add App Template.*



Enter data in one or more fields as needed, and *Save* the new App Template.



Perform a QuickSearch for all Applicants with a status of *Future* and an Position of *Programmer.*

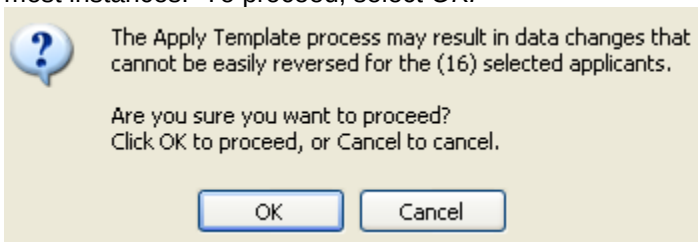


	ID	Name	Status	Recruiter Name	Entered
▶	23	Ammerman, John	Future	Knox, Katherine	06/20/2004
	47	Baxter, James	Future	Knox, Katherine	07/09/2004
	34	Carson, Helen	Future	Knox, Katherine	06/30/2004
	2	Dooley, Thomas	Future	Knox, Katherine	06/07/2004
	74	Edmondson, George	Future	Knox, Katherine	07/28/2004
	3	Gessinger, Harvey	Future	Knox, Katherine	06/07/2004

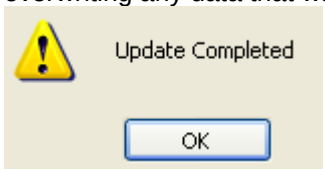
Once the Applicant list is returned, select *Action* | *Apply Template*, and click on the name of the App Template previously created. Before selecting *OK*, verify that all records displaying on the list need to be changed, select *OK* to run the Action.



The system will prompt for confirmation before the Template is applied, as this is not easily reversed in most instances. To proceed, select *OK*.


The Apply Template process may result in data changes that cannot be easily reversed for the (16) selected applicants.
Are you sure you want to proceed?
Click OK to proceed, or Cancel to cancel.
OK
Cancel

A message confirming the Action was completed will appear. The listed records now have the new data, overwriting any data that was previously in the affected field(s).



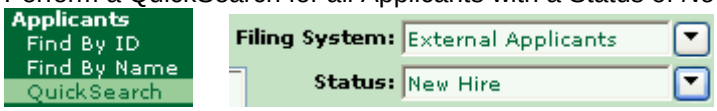
NOTE: The Apply Template Action works the same way for Requisitions.

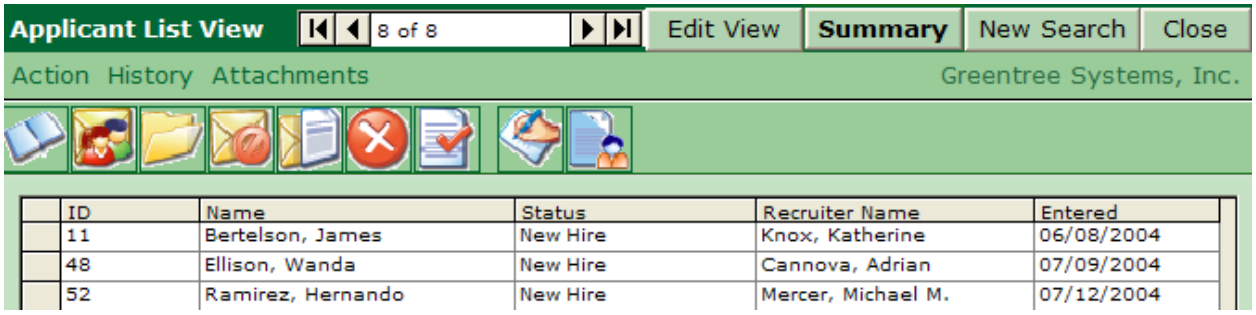
Change Filing System

This action is available for both *Applicants* and *Requisitions*, from the *List View.* It is used to move a selected group of records from one Filing System to another. Completing this Action will cause each of the affected records to be re-numbered according to the *Mask* of the new *Filing System*.

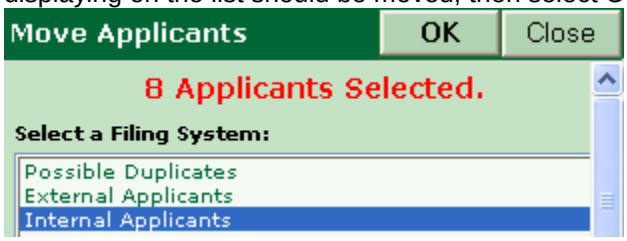
Example: *Hired* Applicants who are in the *External Filing System* applied for promotions and thus need to become records in the *Internal Filing System*.

Perform a QuickSearch for all Applicants with a Status of *New Hire* and a Filing System of *External.*

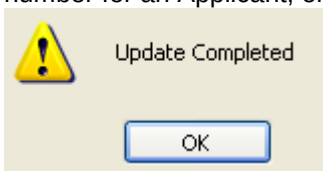



Applicant List View
8 of 8
Edit View
Summary
New Search
Close
Action History Attachments
Greentree Systems, Inc.
ID Name Status Recruiter Name Entered
11 Bertelson, James New Hire Knox, Katherine 06/08/2004
48 Ellison, Wanda New Hire Cannova, Adrian 07/09/2004
52 Ramirez, Hernando New Hire Mercer, Michael M. 07/12/2004

Once the Applicant list is returned select *Action* | *Change Filing System*, then select the *Filing* System to which the Applicants should be moved, *Internal Applicants*. Before selecting *OK*, verify that all records displaying on the list should be moved, then select *OK* to run the Action.



A message confirming the Action was completed will appear. The listed records now are a part of the selected *Filing System*, with a new ID number assigned to them. This is the ONLY way to change the ID number for an Applicant, or the Req Number for a Requisition.



NOTE: *The Change Filing System Action works the same way for Requisitions.* Requisitions cannot be moved into another *Filing System* if the new *Filing System* has a *Mask* that contains a "?". See **Filing System Maintenance** for more information.

Archive

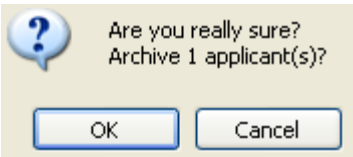
This action is available for *Applicants* and *Hiring Managers* from the List *View* only. This is used to 'move' the Applicants out of your current system and into an archived file behind the scenes. Applicants/Hiring Managers who are moved into this file will not show up in searches, drop down lists, etc. This is ideal for older Applicant information or Hiring Managers that have left the organization but their information still needs to be retained.

Select *Action* | *Archive*, a box will pop up letting you know the number of Applicants selected for archival, make sure this number is accurate and Select *OK* to continue.



This system will present you with two verification boxes, to continue select *OK* for each.





NOTE: Archived Applicants/Hiring Managers can be restored or permanently deleted in the Maintenance section of iGreentree. For more information on these actions visit *Archived Applicants/Hiring Mgrs*, earlier in this chapter.

Purge

This action is available for *Applicants, Requisitions, Sources, Hiring Managers,* and *Templates* from the *List View*. This is used to **permanently** remove old records from the database. Purging policies and procedures, including frequency should be outlined and understood by all team members. *It is recommended that the* Purge *function should be restricted to certain Users, to avoid accidental removal of records.*

Purging large quantities of old data may improve system performance. However, attempts to purge too many records at once may result in a "purge failed" message due to a system timeout. If this occurs, try multiple purges of smaller record sets.

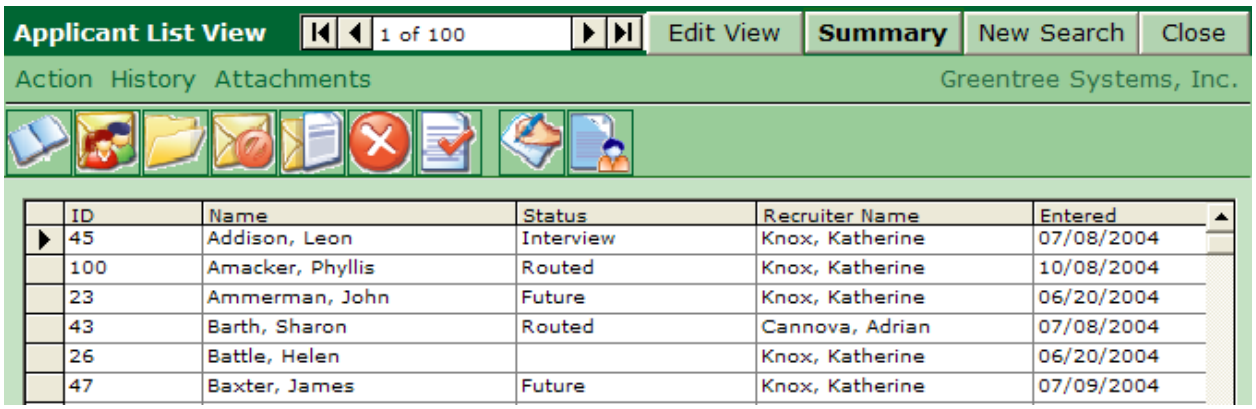
IMPORTANT: ***ALWAYS make sure there is a recent, complete backup of the iGreentree database before purging any data.***

***Example*:** It is the end of the second calendar year using the iGreentree system, and management wants to be rid of Applicant records that were entered more than a year ago.

Perform an Applicant *QuickSearch* to find the Applicants who were entered *Last Year.*





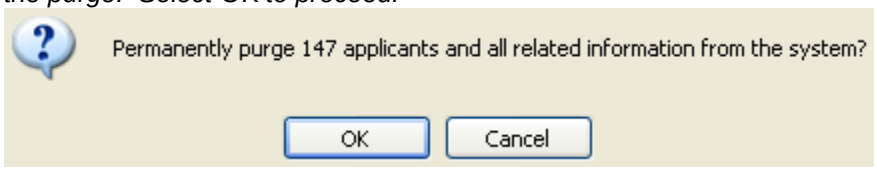


ID	Name	Status	Recruiter Name	Entered
45	Addison, Leon	Interview	Knox, Katherine	07/08/2004
100	Amacker, Phyllis	Routed	Knox, Katherine	10/08/2004
23	Ammerman, John	Future	Knox, Katherine	06/20/2004
43	Barth, Sharon	Routed	Cannova, Adrian	07/08/2004
26	Battle, Helen		Knox, Katherine	06/20/2004
47	Baxter, James	Future	Knox, Katherine	07/09/2004

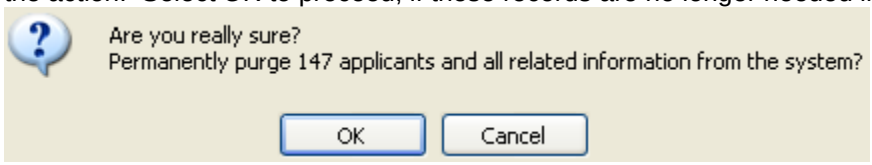
Once the Applicant list is returned select *Action* | *Purge,* or use the quick launch button  located on the toolbar. By now the Applicants should have been reviewed to make sure that no recent activity has occurred, and that all records can be *Purged*. If there are some that should be removed, highlight each record and hit the *Delete* button on the keyboard. This will remove them from the *Purge* list, but they will remain in the database for reference. *Select* OK *to proceed.*



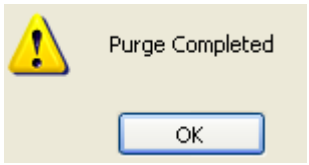
Purge will remove not only the Applicants, but also any reference to these Applicants in Req, Source, or Hiring Mgr History. Purge cannot be undone, so it asks for confirmation twice before actually performing the purge. Select OK *to proceed.*



If confident these records should be permanently deleted (along with all their history), then choose to run the action. Select *OK* to proceed, if these records are no longer needed in the database.



The selected records will no longer be available in the iGreentree system, as confirmed by the message window.



NOTE: The Purge *Action works the same way for Requisitions, Sources, Hiring Managers, and Templates.*

Module Maintenance

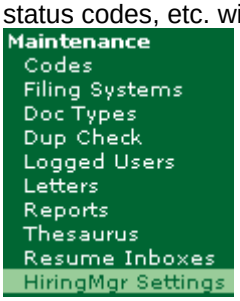
Hiring Manager Module

Hiring Manager Module is a tool that allows Hiring Managers to submit a Requisition into iGreentree and automate its approval on-line. Each Manager has a password that enables them to log into the Hiring Manager module web page. The approval process is facilitated by email notifications to each approver with links back to the approval page within the Hiring Manager module.

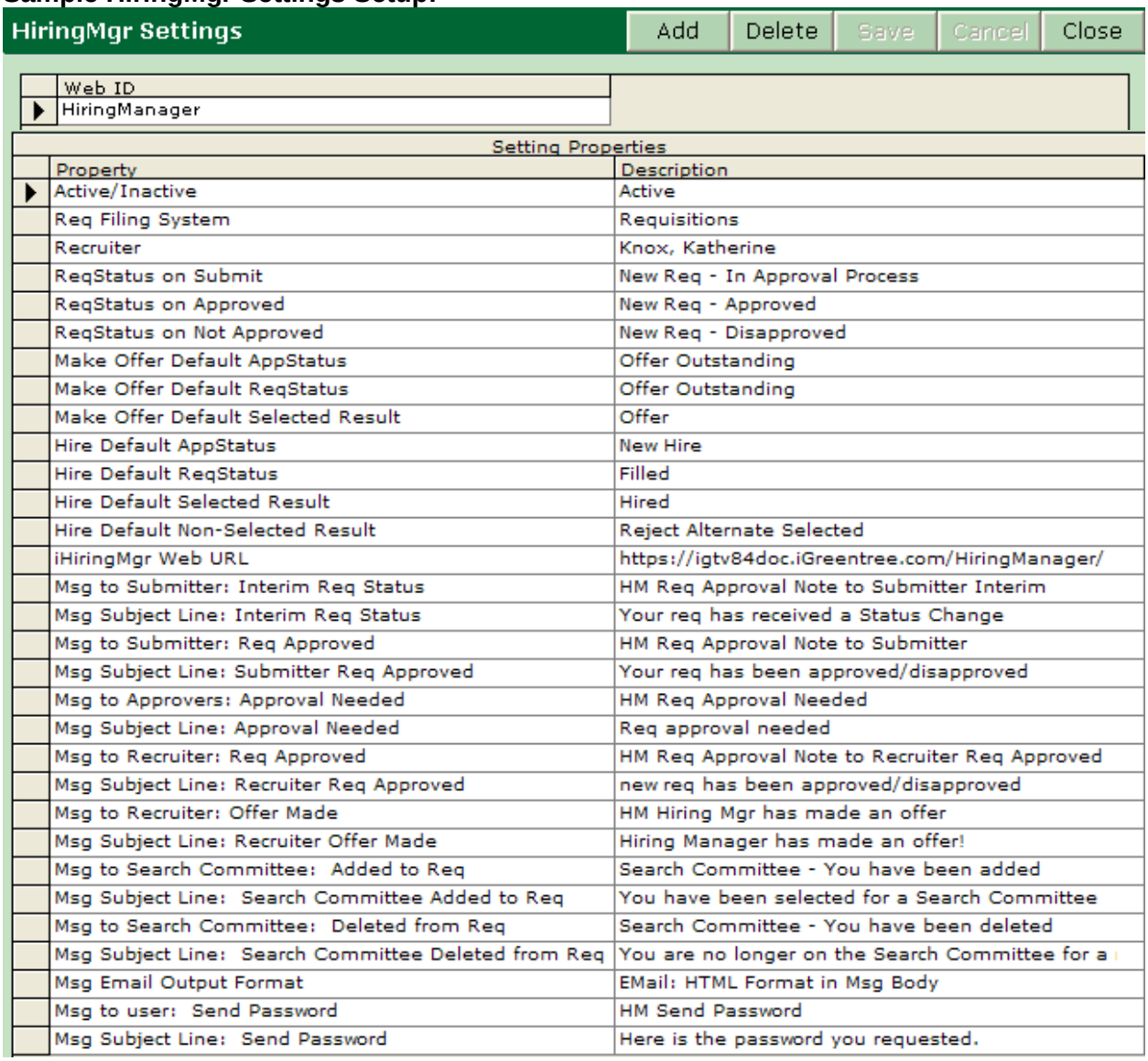
Maintenance functions for the Hiring Manager module will typically be performed by the iGreentree Administrator.

HiringMgr Settings

iGreentree *Maintenance* | *HiringMgr Settings* is where organizations define which filing systems, letters, status codes, etc. will be used for the Hiring Manager module.



Sample HiringMgr Settings Setup:



HiringMgr Settings

Add | Delete | Save | Cancel | Close

Web ID
HiringManager

Setting Properties

Property	Description
Active/Inactive	Active
Req Filing System	Requisitions
Recruiter	Knox, Katherine
ReqStatus on Submit	New Req - In Approval Process
ReqStatus on Approved	New Req - Approved
ReqStatus on Not Approved	New Req - Disapproved
Make Offer Default AppStatus	Offer Outstanding
Make Offer Default ReqStatus	Offer Outstanding
Make Offer Default Selected Result	Offer
Hire Default AppStatus	New Hire
Hire Default ReqStatus	Filled
Hire Default Selected Result	Hired
Hire Default Non-Selected Result	Reject Alternate Selected
iHiringMgr Web URL	https://igtv84doc.iGreentree.com/HiringManager/
Msg to Submitter: Interim Req Status	HM Req Approval Note to Submitter Interim
Msg Subject Line: Interim Req Status	Your req has received a Status Change
Msg to Submitter: Req Approved	HM Req Approval Note to Submitter
Msg Subject Line: Submitter Req Approved	Your req has been approved/disapproved
Msg to Approvers: Approval Needed	HM Req Approval Needed
Msg Subject Line: Approval Needed	Req approval needed
Msg to Recruiter: Req Approved	HM Req Approval Note to Recruiter Req Approved
Msg Subject Line: Recruiter Req Approved	new req has been approved/disapproved
Msg to Recruiter: Offer Made	HM Hiring Mgr has made an offer
Msg Subject Line: Recruiter Offer Made	Hiring Manager has made an offer!
Msg to Search Committee: Added to Req	Search Committee - You have been added
Msg Subject Line: Search Committee Added to Req	You have been selected for a Search Committee
Msg to Search Committee: Deleted from Req	Search Committee - You have been deleted
Msg Subject Line: Search Committee Deleted from Req	You are no longer on the Search Committee for a
Msg Email Output Format	EMail: HTML Format in Msg Body
Msg to user: Send Password	HM Send Password
Msg Subject Line: Send Password	Here is the password you requested.

Web ID:
If using one Hiring Manager web site, *Web ID* will typically be set to *HiringManager.* However, the Web ID can be modified to reflect specific Hiring Manager web sites.

Active/Inactive:
Defines whether the Hiring Manager module is available for use. *Active* will make the module available to Hiring Managers who have a valid 'User Name' and 'Password' set up (see Chapter 2 - Hiring Manager Requisition Management). *InActive* will deactivate the module and Hiring Managers will not be able to use the module. This setting is often used when maintenance is being done to this web or the server that is hosting the web(s).

Req Filing System:
Defines the Requisition filing system for requisitions entered via this Hiring Manager web. The filing system will determine the numbering used upon Requisition submission. NOTE: Only filing systems that are set up with automatic number assignment may be utilized (i.e. no '?' may be used in the filing system mask).

Recruiter:
Defines the recruiter to automatically be assigned to requisitions entered via this Hiring Manger web. Some systems are designed for the Hiring Manager to select a recruiter when completing the on-line requisition. In that scenario this field would be left as [None].

ReqStatus on Submit:
Defines the Requisition status to be given to requisitions submitted by the Hiring Manager. "New Req – In Approval Process" is a commonly used ReqStatus code for this field.

ReqStatus on Approved:
Defines the Requisition status to be given to requisitions once the ENTIRE designated approval process has been successfully completed. "New Req – Approved" is a commonly used ReqStatus code for this field.

ReqStatus on Not Approved:
Defines the Requisition status to be given to requisitions if one or more approvers reject it. "New Req – Disapproved" and "New Req – Rejected by Approver" are commonly used ReqStatus codes for this field.

Make Offer Default AppStatus:
Defines the default 'Applicant Status' field value to display on the 'Make Offer' form when a Hiring Manager selects the 'Make Offer' menu option in the Hiring Manager module. "Offer Outstanding" is a commonly used AppStatus code for this field.

Make Offer Default ReqStatus:
Defines the default 'Requisition Status' field value to display on the 'Make Offer' form when a Hiring Manager selects the 'Make Offer' menu option in the Hiring Manager module. "Offer Outstanding" is a commonly used ReqStatus code for this field.

Make Offer Default Selected Result:
Defines the default 'Result for this Req' field value to display on the 'Make Offer' form when a Hiring Manager selects the 'Make Offer' menu option in the Hiring Manager module. "Offer" is a commonly used Result code for this field.

Hire Default AppStatus:
Defines the default 'Applicant Status' field value to display on the 'Hire' form when a Hiring Manager selects the 'Hire' menu option in the Hiring Manager module. "New Hire" is a commonly used AppStatus code for this field.

Hire Default ReqStatus:
Defines the default 'Requisition Status' field value to display on the 'Hire' form when a Hiring Manager selects the 'Hire' menu option in the Hiring Manager module. "Filled" is a commonly used ReqStatus code for this field.

Hire Default Selected Result:
Defines the default 'Result for this Req' field value to display on the 'Hire' form when a Hiring Manager selects the 'Hire' menu option in the Hiring Manager module. "Hired" is a commonly used Result code for this field.

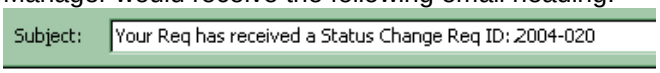
Hire Default Non-Selected Result:
Defines the default 'Assign Result for other Apps' value to display and then assign to all checked applicants, when the "Assign Result to Non-Selected Applicants" button on the 'Hire' form, is selected when the 'Hire' menu option is displaying in the Hiring Manager module. "Reject Alternate Selected" is a commonly used Result code for this field.

iHiringMgr Web URL:
Defines the web location of the Hiring Manager module. Typically it will be similar to the following: [YourCompanysiGreentreeWebServer]/HiringMgr/. Check with the web server administrator if unsure of this value.

Msg to Submitter: Interim Req Status:
Defines which letter will be emailed to the requisition's Submitter (initiator) every time there is an approver status change. For example, if Approver1 approves (or disapproves) the requisition, the letter *HM Req*

Approval Note to Submitter Interim will be emailed to the initiating Hiring Manager. The data insert item, «HiringMgrHREF-ToHiringMgr», must be defined in this letter if a hyperlink is to be embedded in the email to allow the Submitter direct access to the Hiring Manager Requisition approval screen. The Letter Action assigned to this letter must be 'Req Approval Review Interim.' This Action should only be defined for one letter.

Msg Subject Line: Interim Req Status:
Defines the beginning text of the Subject Line for all interim approval emails sent to the Submitter. For example, "Your Req has received a Status Change" is added on the Subject line the initiating Hiring Manager would receive the following email heading:



Msg to Submitter: Req Approved:
Defines which letter will be emailed to the requisition's initiator once all designated approvers have given their approval. The data insert item, «HiringMgrHREF-ToHiringMgr», must be defined in this letter if a hyperlink is to be embedded in the email to allow the Submitter direct access to the Hiring Manager Requisition approval screen. The Letter Action assigned to this letter must be 'Req Approval Review Completed to HiringMgr.' This Action should only be defined for one letter.

Msg Subject Line: Submitter Req Approved:
Defines the text of the Subject Line for emails sent to notify Requisition Submitters that their Requisition has been fully approved.

Msg to Approvers: Approval Needed:
Defines which letter will be emailed to designated approvers notifying them to review a submitted requisition. The data insert item, «HiringMgrHREF-ToApprover», must be defined in this letter if a hyperlink is to be embedded in the email to allow the Approver direct access to the Hiring Manager Requisition approval screen. The Letter Action assigned to this letter must be 'Req Approval Review Request.' This Action should only be defined for one letter.

Msg Subject Line: Approval Needed:
Defines the text of the Subject Line for emails sent to notify Requisition Approvers that a Requisition is available for their review and approval.

Msg to Recruiter: Req Approved:
Defines which letter will be emailed to the designated recruiter when a Requisition has been fully approved. The data insert item, «HiringMgrHREF-ToRecruiter», must be defined in this letter if a hyperlink is to be embedded in the email to allow the assigned Recruiter direct access to the Hiring Manager Requisition approval screen. The Letter Action assigned to this letter must be 'Req Approval Review Completed to Recruiter.' This Action should only be defined for one letter.

Msg Subject Line: Recruiter Req Approved:
Defines the text of the Subject Line for all emails sent to notify Requisition Recruiters that their assigned Requisition has been fully approved.

Msg to Recruiter: Offer Made:
Defines which letter will be emailed to the designated recruiter when a Hiring Manager has extended an offer to an Applicant against a Requisition that is assigned to them. The Letter Action assigned to this letter must be 'Hiring Mgr Notify Recruiter Offer Made.' This Action should only be defined for one letter.

Msg Subject Line: Recruiter Offer Made:
Defines the text of the Subject Line for all emails sent to Requisition Recruiters notifying them that a Hiring Manager has extended an offer to an Applicant against a Requisition that is assigned to them.

Msg to Search Committee: Added to Req
Defines which letter will be emailed to the listed Search Committee Members when they have been added to the requisition. The Letter Action assigned to this letter must be 'Hiring Mgr Search Committee Added to Req.' This Action should only be defined for one letter.

Msg Subject Line: Committee Added to Req
Defines the text of the Subject Line for all emails sent to Search Committee Members notifying them that they have been added to the Requisition as a Search Committee Member.

Msg to Search Committee: Deleted from Req
Defines which letter will be emailed to the listed Search Committee Members when they have been removed from the requisition. The Letter Action assigned to this letter must be 'Hiring Mgr Search Committee Deleted from Req.' This Action should only be defined for one letter.

Msg Subject Line: Search Committee Deleted from Req
Defines the text of the Subject Line for all emails sent to Search Committee Members notifying them that they have been removed from the Requisition as a Search Committee Member.

Msg Email Output Format:
This field offers two choices of format for the email output of all automated hiring manager letters. The *Email:HTML Format in Msg Body* allows hyperlinks to be used within the emails.

Msg to user: Send Password:
Defines which letter will be emailed to the Hiring Manager when they have forgotten their password and have requested it be sent to them. The Letter Action assigned to this letter must be 'Hiring Mgr Send Password'. This Action should only be defined for one letter.

Msg Subject Line: Send Password:
Defines the text of the Subject Line for the email sent to a Hiring Manager when they have forgotten their password and have request it be sent to them.

The following are additional steps required to implement the Hiring Manager module:

1. Modify the required form letters in *Maintenance* | *Letters.*
   The following letters are provided standard in all iGreentree Systems for use with the Hiring Manager module:

	HM Hiring Mgr has made an offer	Hiring Mgr Notify Recruiter Offer Made	False
	HM Offer Made Notification	Hiring Mgr Notify Recruiter Offer Made	True
	HM Req Approval Needed	Req Approval Review Request	False
	HM Req Approval Note to Recruiter Req Approved	Req Approval Review Completed to Recruiter	False
	HM Req Approval Note to Submitter	Req Approval Review Completed to HiringMgr	False
	HM Req Approval Note to Submitter Interim	Req Approval Review Interim	False
	HM Send Password	Hiring Mgr Send Password	False

2. Add required code values to CodeTypes: AppStatus, ReqApprovalStatus, ReqStatus, and Result in *Maintenance* | *Codes*. Be sure to define all 'Additional Properties' for each of the code values.
3. Define which potentially available Applicant documents in iGreentree should be viewable by the Hiring Manager via the Hiring Manager module in *Maintenance* | *Doc Types* | *DocType.*
4. Identify the 'Req Approval Process Type' in iGreentree *Maintenance* | *System Settings*.
   Parallel: All designated Approvers must review and approve the requisition.
   Serial: Designated Approvers are assigned an approval hierarchy. For example, if Approver3 approves the requisition, this will override the need for Approver1 and Approver2 to review and approve the requisition.

	Property	Value
	Company Name	Greentree Systems, Inc.
	QuickSearch Result Maximum Rows	500
	QuickSearch Result Threshold	100
▶	Req Approval Process Type	Parallel
	Route Email Subject Prefix	

5. Set the *Default Hiring Manager Web Site* in *Maintenance* | *System Settings*.

	Property	Value
	Company Name	Greentree Systems, Inc.
▶	Default Hiring Manager Web Site	HiringManager
	Editing of Notes	Editing Allowed By Creator Only

6. Add Hiring Manager records in iGreentree Hiring Mgrs section.
   At a minimum, Hiring Manager records in iGreentree need to have the following fields populated: FirstName, LastName, Title, valid Email address, Status=Active, User Name, and Password.

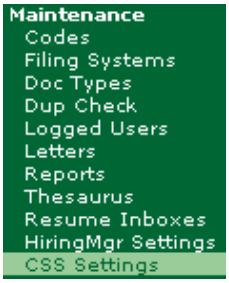
Candidate Self-Service Module

Candidate Self-Service (CSS) is an iGreentree module that provides Applicants with real-time access to view and apply for existing job openings while also making available to them a tool that allows them to set job alerts for future openings. A candidate who applies can return at a later date to follow up on the status of their Application and/or to update their information. CSS stores the information entered by the Applicant so that it can be accessed and used when applying for other positions thus avoiding the need to complete another Application from scratch.

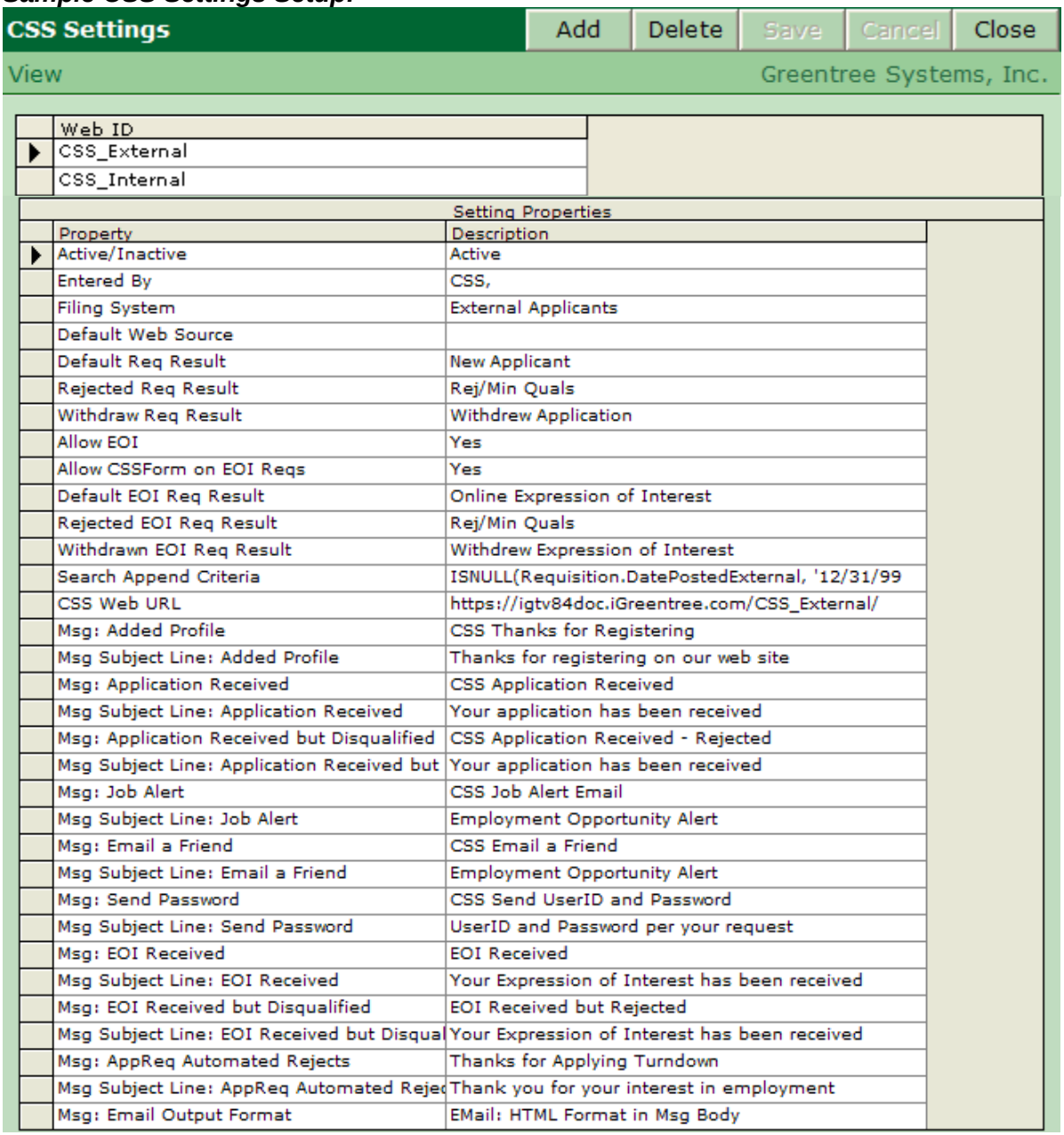
Most of the maintenance functions for the Candidate Self-Service Module will be performed by the iGreentree Administrator.

CSS Settings

iGreentree's *Maintenance* | *CSS Settings* is where organizations define which filing systems, results, letters, etc. will be used for a particular web. Also defined will be the criteria for which positions will post to the specific CSS and what Requisition information will be displayed for the applicant's review/consideration.



Sample CSS Settings Setup:



Oftentimes companies will elect to have multiple CSS applications (Web ID) created. For example, they may tailor one specifically for external applicants and another for their internal applicants. In addition to tailoring differently, the option exists to set different settings for each *Web Id* in Maintenance. This enables the module to be very flexible in accommodating the differences between the applicants utilizing the Application AND the differences in where they might be going to get to the module.

Setting Properties and Descriptions

- Active/Inactive: Identifies whether or not the CSS Web ID is active. This is often used during web site maintenance.
- Entered By: Identifies the name that will appear in the Entered By field on the Applicant screen for each Applicant that is added from this CSS Web ID. The usual value for this property is *CSS.*
- Filing System: Identifies the *Filing System* into which applicants who apply to this CSS *Web ID* will be placed.

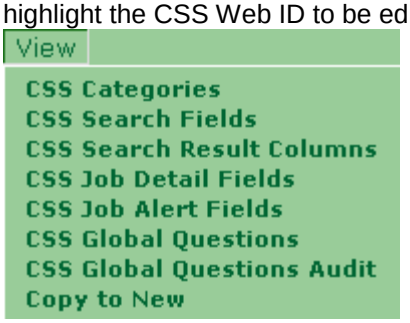
- Default Web Source: Allows you to designate a default source code for each Applicant applying thru your CSS Site. This Source will only be used in the absence of any other source code. No source entry will be created if this is left blank.
- Default Req Result: This identifies the result value which will be assigned to each Applicant who completes an Application for a specific job from this CSS *Web ID* and passes the built in prescreen (if no prescreen is used they will be assigned this result too). The result value will be assigned to the specific Requisition selected by the Applicant before submitting the Application (i.e. the one they were logged by this application). This result will be viewable in iGreentree by going to the Applicant's *Reqs Applied For History* or by viewing the Requisition's *Applicants History* or by using the Application View, such as from an Application QuickSearch.. NOTE: If your organization utilizes the "Set Other App/Req Results To" in the Hire/Fill Action the Result will not be updated for records that were populated by this default.
- Rejected Req Result: This identifies the result value which will be assigned to each Applicant who completes an Application for a specific job from this CSS *Web ID* and fails the requisition prescreen questions. The result value will be assigned to the specific Requisition selected by the Applicant before submitting the Application (i.e. the one they were logged by this application). This result will be viewable in iGreentree by going to the Applicant's *Reqs Applied For History* or by viewing the Requisition's *Applicants* or by using the Application View, such as from an Application QuickSearch.
- Withdraw Req Result: This identifies the result value assigned to a specific Requisition for which the Applicant applied and then chose to withdraw via CSS. This result will be viewable in iGreentree by going to the Applicant's *Reqs Applied For History* or by viewing the Requisition's *Applicants History* or by using the Application View, such as from an Application QuickSearch.
- Allow EOI: This identifies the conditions for when an Expression of Interest (Submit Resume) in CSS is available to the applicant. A value of *Yes* indicates that the EOI option is available if the *Allow Expression of Interest* box is checked on the individual Requisition. A value of *No* causes the EOI option to never be presented, regardless of the *Allow Expression of Interest* box on the individual Requisition. Likewise, a value of *Always* will cause the EOI option to always be presented, regardless of the *Allow Expression of Interest* box on the individual Requisition.
- Allow CSSForm on EOI Reqs: This identifies the conditions for when the full application (Complete Application) is available to the applicant. A value of *Yes* indicates that the choice to complete a full application will be available on the CSS Job Detail page, regardless of whether or not there is also the Expression of Interest option. A value of *No* indicates that when there is an Expression of Interest option, the full application choice is not available. A value *of Only when Result lookup Allow CSSForm Resubmit=Yes* indicates that for initial application, only the EOI option (Submit Resume) is available. If the applicant's Result for this Requisition is changed to one marked with *Resubmit=Yes*, and that applicant attempts to re-apply, the applicant will be presented with the full application (Complete Application) only. If there is no option selected that would present the Expression of Interest choice to the applicant, then the full application choice will always be displayed.
- Default EOI Req Result: This identifies the result value which will be assigned to each Applicant who completes an Expression of Interest for a specific job from this CSS *Web ID* and passes the built in prescreen (if no prescreen is used they will be assigned this result too). The result value will be assigned to the specific Requisition selected by the Applicant before submitting the Expression of Interest (i.e. the one they were logged by this expression of interest). This result will be viewable in iGreentree by going to the Applicant's *Reqs Applied For History* or by viewing the Requisition's *Applicants History* or by using the Application View, such as from an Application QuickSearch.
- Rejected EOI Req Result: This identifies the result value which will be assigned to each Applicant who completes an Expression of Interest for a specific job from this CSS *Web ID* and fails the requisition prescreen questions. The result value will be assigned to the specific Requisition selected by the Applicant before submitting the Expression of Interest (i.e. the one they were logged by this expression of interest). This result will be viewable in iGreentree by going to the Applicant's *Reqs Applied For History* or by viewing the Requisition's *Applicants History* or by using the Application View, such as from an Application QuickSearch.
- Withdrawn EOI Req Result: This identifies the result value assigned to a specific Requisition for which the Applicant submitted an Expression of Interest and then chose to withdraw via CSS. This result will be viewable in iGreentree by going to the Applicant's *Reqs Applied For History* or by

viewing the Requisition's *Applicants History* or by using the Application View, such as from an Application QuickSearch.

- Search Append Criteria: This specifies the formula that further defines the Requisitions which will be included in the results of an Applicant's CSS "Search By Job Number" or "Search Jobs" search.
- CSS Web URL: This is the location of the *Web ID's* web pages. The trailing "/" must be included in this entry as this entry must match the AppRoot entry in the Global.asa.
- Msg: Added Profile: This setting identifies the letter which will be emailed (if they provide an email address) to an Applicant who creates a User Name and Password in CSS.
- Msg Subject Line: Added Profile: This will be the subject for the *Added Profile* email.
- Msg: Application Received: This setting identifies the letter which will be emailed (if they provide an email address) to an applicant, who passes the Application prescreen (or if there was not an Application prescreen), upon successful submittal of their application.
- Msg Subject Line: Application Received: This will be the subject for the *Application Received* email.
- Msg: Application Received Assessment: This setting is currently not active for all customers, please contact Greentree Support for more information.
- Msg Subject Line: Application Received Assessment: This setting is currently not active for all customers, please contact Greentree Support for more information.
- Msg: Application Received but Disqualified: This setting identifies the letter which will be emailed (if they provide an email address) to an Applicant who fails the Application prescreen upon successful submittal of their application.
- Msg Subject Line: Application Received but Disqualified: This will be the subject for the *Application Received but Disqualified* email.
- Msg: Job Alert: This setting identifies the letter which will be emailed (if they provide an email address) to an Applicant who has previously set up a Job Alert to notify him/her of a new job match.
- Msg Subject Line: Job Alert: This will be the subject for the *Job Alert* email.
- Msg: Email a Friend: This setting identifies the letter which will be emailed immediately to the email address provided by an Applicant using the *Email a Friend* capability in CSS.
- Msg Subject Line: Email a Friend: This will be the subject for the *Email a Friend* email.
- Msg: Send Password: This setting identifies the letter which will be emailed immediately to an Applicant who has forgotten their User ID and/or Password and is requesting the information be sent.
- Msg Subject Line: Send Password: This will be the subject for the *Send Password* email.
- Msg: Email Output Format: This is the format which the CSS Letters will be generated. Greentree recommends *HTML Format in Message Body* as this will allow hyperlinks to be imbedded into the emailed letter verbiage.
- Msg: EOI Received: This setting identifies the letter which will be emailed (if they provide an email address) to an applicant who passes the Requisition prescreen questions (or if there were not any Requisition prescreen questions) upon successful submittal of their Expression of Interest (Submit Resume).
- Msg Subject Line: EOI Received: This will be the subject for the EOI Received email.
- Msg: EOI Received but Disqualified: This setting identifies the letter which will be emailed (if they provide an email address) to an applicant who fails the Requisition prescreen questions upon successful submittal of their Expression of Interest.
- Msg Subject line: EOI Received but Disqualified: This will be the subject for the EOI Received but Disqualified email.
- Msg: AppReq Automated Rejects: This setting identifies the letter which will be emailed (if they provide an email address) to an applicant when the Application (AppReq) Result is set to a Result code that has the *Send Automated AppReq Reject Letter* property set to *Yes*. This letter overrides the default letter set in *System Settings*.
- Msg Subject Line: AppReq Automated Rejects: This will be the subject for the AppReq Automated Reject email.

CSS View Menu

View settings can be set for each CSS *Web ID.* To define the View settings for a particular *Web ID*, highlight the CSS Web ID to be edited, such as *CSS_External*, and click View.



CSS Categories

These settings determine what the Applicant views in CSS *Browse Jobs* and the selected categories *Results*.

CSS Categories For CSS_External | Add | Delete | Save | Cancel | Close

	View/SQL	Display Name	Image File Name	Display Order
	CSS_External_NewOpeningsThisWeek	Opportunities New This Week	Person3.gif	5
	CSS_External_Professional	Professional Opportunities	Person2.gif	10
	CSS_External_AllOpeningsByJobTitle	All Opportunities by Job Title	Person4.gif	15
	CSS_External_Adminclerical	Opportunities in Charlotte, NC	Person3.gif	20
	CSS_External_ServiceSupport	Service/Support Opportunities	Person3.gif	25
	CSS_External_Nursing	Nursing Opportunities	Person2.gif	30
	CSS_External_PhysiciansClinical	Physicians & Clinical Opportunities	Person1.gif	35
▶	CSS_External_Technical	Technical Opportunities	Person3.gif	40

- *View/SQL* refers to an existing database SQL query that defines a specific view created in SQL Server to retrieve requisitions corresponding to the category. The query further defines what fields are displayed in the selected categories *Results*.
- *Display Name* refers to the category title that the applicants will see.
- *Image File Name* refers to the image that will be displayed next to the Display Name. Greentree recommends these images be 1 inch x 1 inch (not required).
- *Display Order* refers to the order the categories are to be displayed. They will be displayed by numerical order however it is not necessary for the numbers to be consecutive, as shown below.

The above settings would translate to the following display in CSS *Browse Jobs* and the selected categories *Results*:



CSS Search Fields

These settings determine which Requisition fields will be available to an Applicant in CSS *Search Jobs* and CSS *Job Alerts*. These fields can be used to dynamically define a search to return only requisitions

that meet their search criteria. Fields used in *CSS Search Fields* must be coded fields (with the exception of Keyword which will allow searching of the Job Description).

CSS Search Fields For CSS_External Add | Delete | Save | Cancel | Close

Field Name	Display Name	Display Order	Max Selectable	Display Rows
Posting Category	Position Type	1	1	1
Location	Location	2	3	1
Department	Department	3	3	1
Job Description	Job Description	5	1	1

- *Field Name* refers to the field name (code type) as defined in the database.
- *Display Name* refers to the field title to be seen by applicants.
- *Display Order* refers to the order the field queries are to be displayed. They will be displayed by numerical order however it is not necessary for the numbers to be consecutive.
- *Max Selectable* defines the maximum number of codes that can be selected from this field.
- *Display Rows* defines the height of the display box. However, when the Max Selectable value is equal to 1, the value identified in Display Rows is ignored and only one row will display. In addition, if the Max Selectable value is greater than 1, the number of rows displayed will always be 3, unless the Display Rows value is set to a number greater than 3, in which case the Display Rows value will be used.

The above settings would translate to the following display in CSS *Search Jobs*.

Search Jobs

Search By	Criteria
Position Type:	– Any Position Type –
Location: *Select no more than 3.*	– Any Location – Atlanta Dallas
Department: *Select no more than 3.*	– Any Department – Accounting Critical Care Unit
Job Description:	

NOTE: It is also important to complete the 'Additional Information' window for **all** ReqStatus codes. If this information is not completed, the module will not work correctly. The three 'Additional Information' pieces under each ReqStatus code include I*sClosed*, *IsOpen*, and *IsPendingApproval*. By design, only requisitions with a ReqStatus that has *IsOpen* set to "Yes" are available for posting to CSS.

CSS Search Result Columns

These settings identify the column information that will be displayed when a list of available requisitions are returned.

CSS Search Result Columns For CSS_External Add | Delete | Save | Cancel | Close

Field Name	Display Name	Display Order	Allow Refine Search
JobTitle	Job Title	1	Yes
Location	Location	2	Yes
Department	Department	3	Yes
Req	Job No.	8	No

- *Field Name* refers to the field name as defined in the database.
- *Display Name* refers to the column title as seen by applicants.
- *Display Order* refers to the column order that information will be displayed. They will be displayed by numerical order however it is not necessary for the numbers to be consecutive.

- *Allow Refined Search* defines whether or not a field can be used in further defining a search results. A “Yes” translates to the field being available in the refine search; “No” translates to the field not being available in the refine search.

The above settings would translate to the following display in CSS *Search Jobs Results*.

Job Title	Location	Department	Job No.
1. Registered Nurse	Metroplex Center	Critical Care Unit	2005-018
2. Registered Nurse - Cath Lab	Suburban Tower	Cardiac Cath Lab	2005-025
3. Registered Nurse- Cath Lab	Chicago	Hospice	2005-031

CSS Job Detail Fields

These settings identify the information that will be displayed when a specific Requisition is selected from the search results. This information is presented to the Applicant in the form of a *Job Detail* page.

CSS Job Detail Fields For CSS_External Add | Delete | Save | Cancel | Close

Field Name	Display Name	Display Order	Include In Title
JobTitle	Job Title:	1	Yes
Req	Req:	2	No
Location	Location:	3	No
Department	Department:	4	No
Schedule	Schedule	5	No

- *Field Name* refers to the field name as defined in the database.
- *Display Name* refers to the column title as seen by applicants.
- *Display Order* refers to the column order that information will be displayed. They will be displayed by numerical order however it is not necessary for the numbers to be consecutive.
- *Include in Title* defines whether or not the field data should be included in the title of the *Job Detail* page. A “Yes” translates to the field being included in the title; “No” translates to the field not being included in the title.

The above settings would translate to the following display in CSS *Job Detail*.

Job Detail



To apply for this **Registered Nurse- Cath Lab** position, click on Submit Resume or Complete Application .

Return to Previous Page

Email this job to a friend

Job Title:	Registered Nurse- Cath Lab
Req:	2005-031
Location:	Chicago
Department:	Hospice
Schedule	M-F 8am-5pm

Job Description:

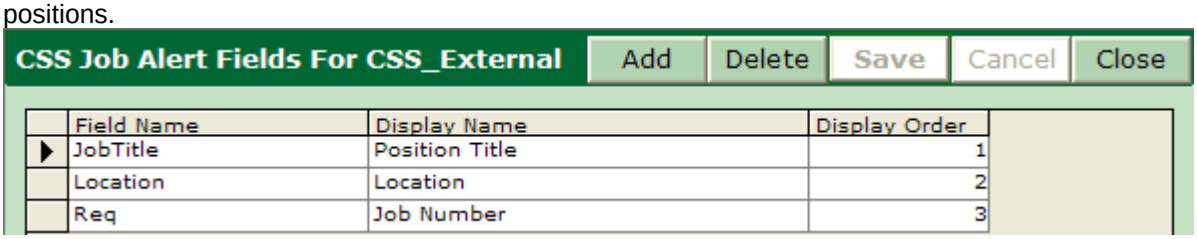
Join our team as a Registered Nurse to work PRN in the cath lab and recovery room in our outpatient diagnostic cath lab. The Cardiac Cath Lab Registered Nurse is responsible for assisting the cardiologist in diagnostic cardiac catheterizations on adult patients and providing quality nursing care, assessing and managing patient care in the cardiac catheterization lab. Additionally, the Cardiac Cath Lab Registered Nurse will assist the cardiologists in all aspects of invasive cardiology, including scrubbing, circulating, monitoring and recording hemodynamic parameters.

Job Qualifications:

The ideal candidate will have a minimum 2 years experience in critical care. Diagnostic/interventional cardiac cath experience is preferred. Current state license and BLS/ACLS required.

CSS Job Alert Fields

These settings define the data that will be included in the *iCSSJobAlertSummaryBlock* letter insert. This letter insert is often used in the Job Alert emails that are generated to inform applicants of newly posted positions.



Field Name	Display Name	Display Order
JobTitle	Position Title	1
Location	Location	2
Req	Job Number	3

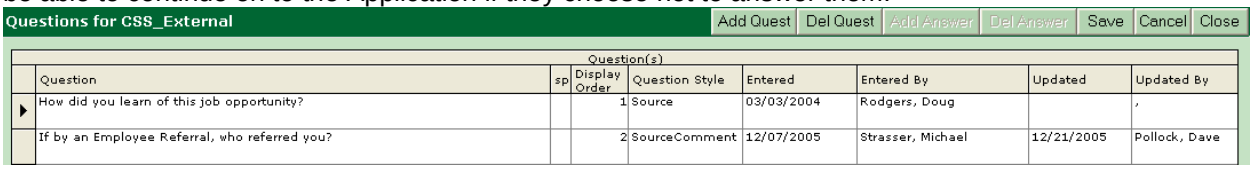
- *Field Name* refers to the field name as defined in the database.
- *Display Name* refers to the column title as seen by applicants.
- *Display Order* refers to the column order that information will be displayed. They will be displayed by numerical order however it is not necessary for the numbers to be consecutive.

The above settings would translate to the *iCSSJobAlertSummaryBlock* insert which was used in the following Job Alert email.


The following positions have recently become available. Click on a link below to view information and apply for that position.
Position Title
Location
Job Number
Senior Administrative Assistant
Chicago
2003-011

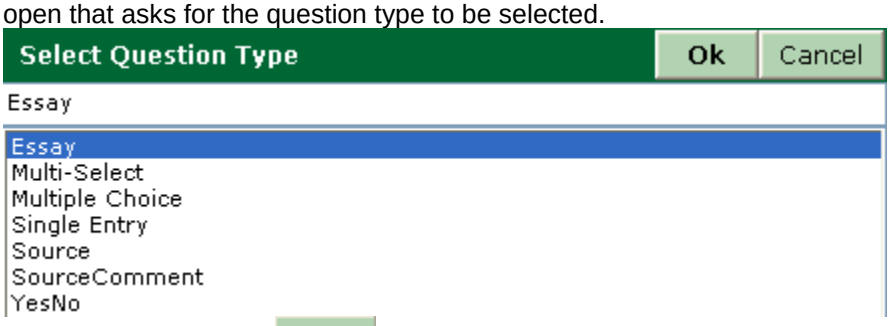
CSS Global Questions

These settings identify prescreen questions that will be asked of every Applicant who applies for a job through the selected CSS *Web ID*. The applicants will be required to answer the questions and will not be able to continue on to the Application if they choose not to answer them.



Question(s)							
Question	sp	Display Order	Question Style	Entered	Entered By	Updated	Updated By
How did you learn of this job opportunity?		1	Source	03/03/2004	Rodgers, Doug		,
If by an Employee Referral, who referred you?		2	SourceComment	12/07/2005	Strasser, Michael	12/21/2005	Pollock, Dave

The questions may be essay, multi-select (allows for selection of multiple answers), multiple choice, single entry, source, or yes/no. To add a prescreen question click the Add Quest button. A window will open that asks for the question type to be selected.



Select Essay and click Ok. A question will be added with the temporary label “New Question#” (where # is equal to the total count of existing questions plus 1). Click on the temporary question label and type over it with the actual question to be asked.



No answer needs to be identified as an Essay question will provide the Applicant with a large text box for answer entry.

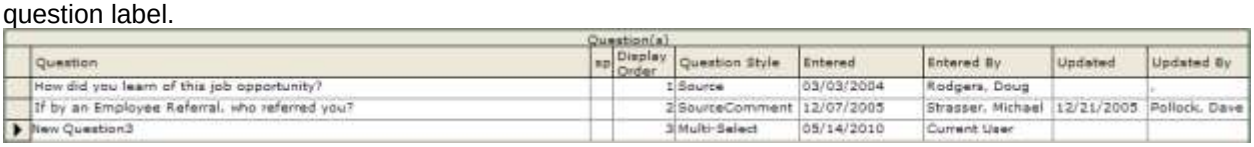
Click the Save button to save the *Global Question* and to actively start asking applicants for this information.

Single Entry, Source, and Yes/No questions will be entered in much the same way as the Essay questions. No answer needs to be provided as the Single Entry will have a text box for the applicant's answer and the Source question will provide the Applicant with the Source Type coded list. The Yes/No questions will automatically be set up with Yes and No answer choices.

Answer	sp	Display Order
Yes		1
No		2

When adding Multi-Select or Multiple Choice questions, answers must be identified. For example:

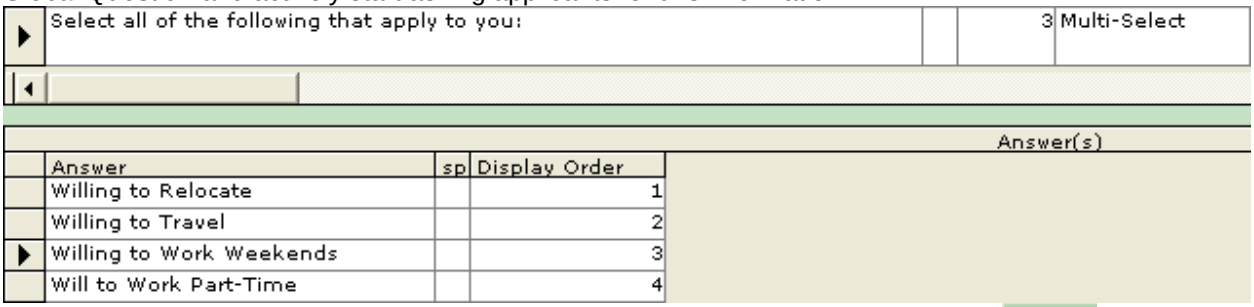
First, add a prescreen question by clicking the Add Quest button. When the window opens asking for the question type select *Multi-Select*. A new question will be added to the table with the temporary question label.



Edit the temporary question label to read "Select all of the following that apply to you:" Then click the Add Answer button to be allowed to enter the first possible answer. A temporary label for the answer will be inserted. Click the temporary label and type over it with an answer. The *Display Order* will default to 1.

Answer	sp	Display Order
New Answer1		1

Click Add Answer again and insert another. Repeat until there are four answers. *Display Order* refers to the column order of the information when displayed for the applicant. They will be displayed by numerical order however it is not necessary for the numbers to be consecutive. Click Save to save this *Global Question* and actively start asking applicants for this information.



If a question is created incorrectly it can be cancelled before the save by clicking the Cancel button. If the question has been saved, the Del Quest button must be used to stop the question from being actively asked of applicants.

The answers given by applicants to the *Global Questions* are kept within the applicant's CSSForm. This form is viewable in the applicant's *Document List* Attachment in iGreentree. With the exception of the Source Question Style, the answers are stored in the *CSS Question Answers History* (source responses will populate the applicant's *Sources History*).

CSS Global Questions Audit
This is a non-editable history of the changes that have been made to *Global Questions* in the *CSS Global Questions*. Details of any questions that have been added or deleted will appear here (questions that are canceled before they are saved will not be recorded).

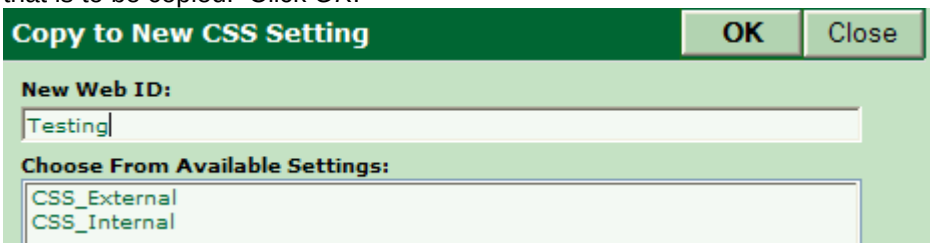
CSS Question Audit for CSS_internal

Description	Updated	Updated By
ADDED ANSWER [No], WEIGHT [Ignore], DISPLAY ORDER [2], FOR QUESTION [Company policy	12/21/2005 11:50:05 AM	Pollock, Dave
ADDED ANSWER [Yes], WEIGHT [], DISPLAY ORDER [1], FOR QUESTION [Company policy requires that	12/21/2005 11:50:05 AM	Pollock, Dave
ADDED QUESTION [Company policy requires that an employee requesting a transfer to a new position	12/21/2005 11:50:04 AM	Pollock, Dave
DELETED QUESTION [Company policy requires that an employee requesting a transfer to a new position	12/21/2005 11:49:40 AM	Pollock, Dave
ADDED ANSWER [No], WEIGHT [Ignore], DISPLAY ORDER [2], FOR QUESTION [Company policy	12/21/2005 11:44:08 AM	Pollock, Dave
ADDED ANSWER [Yes], WEIGHT [], DISPLAY ORDER [1], FOR QUESTION [Company policy requires that	12/21/2005 11:44:08 AM	Pollock, Dave
ADDED QUESTION [Company policy requires that an employee requesting a transfer to a new position	12/21/2005 11:44:06 AM	Pollock, Dave

- *Description* will identify the change that occurred including whether it was an addition or delete and the specific details of the change.
- *Updated* identifies the date and time of the change.
- *Updated By* identifies which User made the change.

Copy to New
Allows the User to copy an existing *Web ID* in order to create an identical *Web ID*.

Enter the name of the CSS web being added on the *New Web ID* field. Select the existing CSS Web ID that is to be copied. Click *OK*.



A new CSS *Web ID* has been added. The *Setting Properties* for this *Web ID* will be populated exactly like the *Web ID* which was copied.

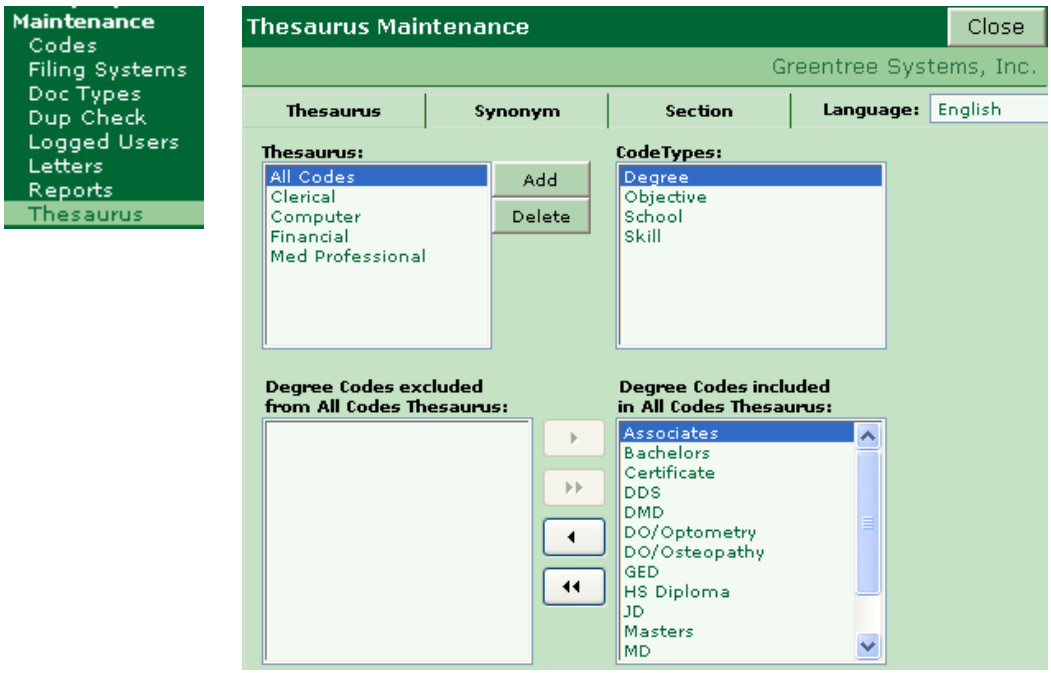
Resume Processing Maintenance

Thesaurus Maintenance
A Thesaurus is a set of codes to be used for Resume Processing. Separate Thesauri can be created for different types of Applicants who apply, limiting the codes the system has to search for to those that are appropriate for that type of Applicant.

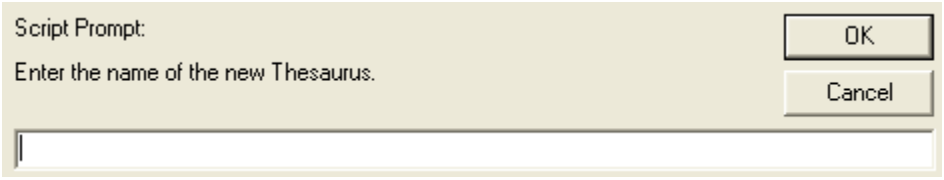
Create and Modify Thesauri

The system looks for a great deal of information when it analyzes resumes. Sometimes it may find information that is not applicable for particular Applicants. So establishing thesauri for each of the major types of Applicants who apply can help the system find only the most appropriate information for each Applicant.

Choose *Thesaurus* from the *Maintenance* menu.



Choose  from the *Thesaurus* window.

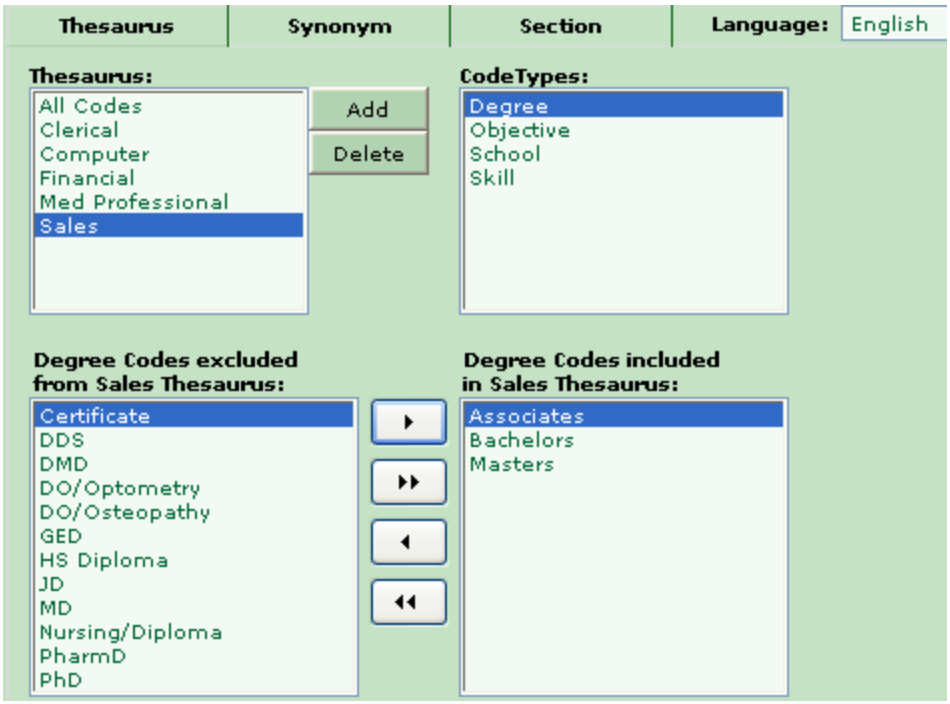


Create a name for the new Thesaurus and click OK.

Now select Codes for each of the Code Types available on the right. Degree is already highlighted, so the Degree codes are displayed at the bottom of the window.

Select any and all codes that might be appropriate for sales applicants, and move them to the *Selected* column using the arrows between the columns. *Double clicking on a code will also move it to the opposite column.*

HINT: *With the cursor already in the column to be selected from, type the first letter of the code needed to jump to that section of the code list.*

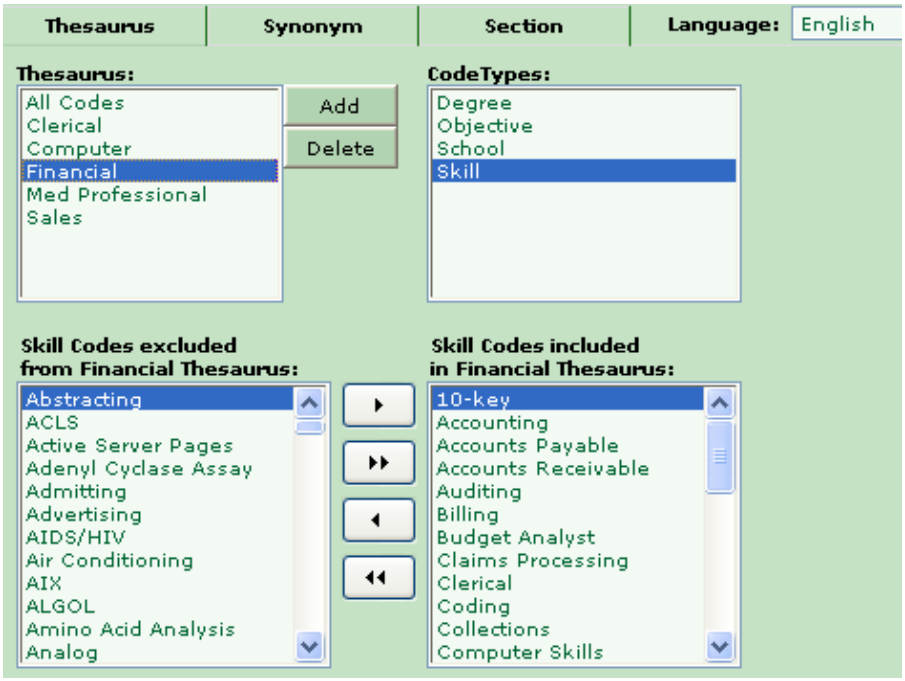


For Degrees, it may be that ALL of the Codes are appropriate for this thesaurus. If so, use the double-

arrow button  **to move them all.**

The  *button may be useful when most of the codes are needed, then the User could move individual codes one at a time using the single arrow that points back to the left.* 

The most important Code Type to set for each Thesaurus is usually Skill. Select *Skill* from the list of Code Types at the top right and then pick the appropriate skills from the list using the arrows.



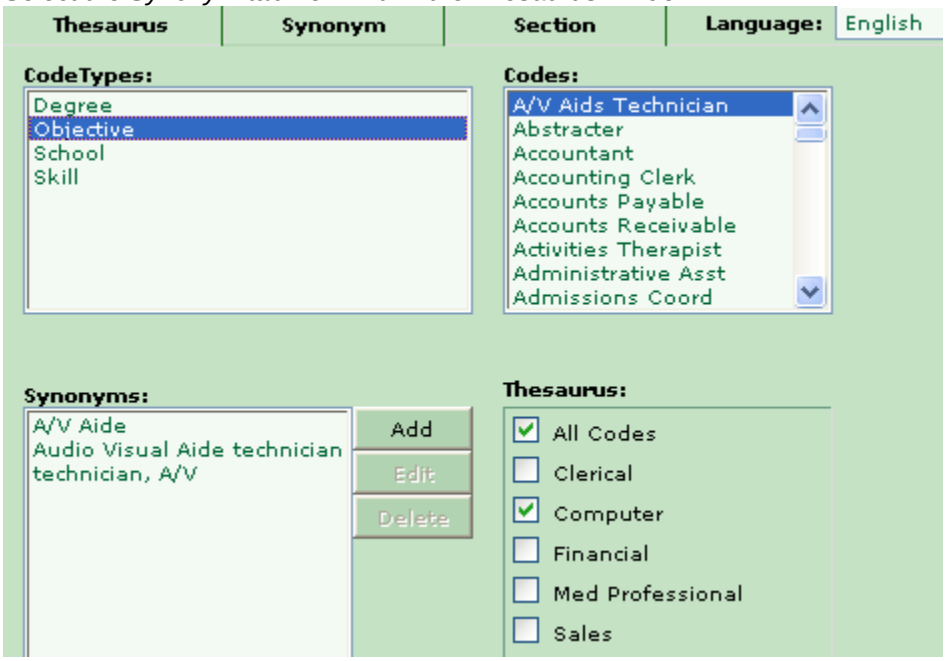
Synonyms

There is often more than one way to say the same thing. Synonyms are used to enable the system to find variations of the same code with an Applicant's resume and standardize how it is presented to the users. This in turn allows the User to simplify their search for Applicants by using the standardized term.

Greentree recommends using the most common term as the code. Synonyms should be created for each code so Applicants who utilize another term for the code are updated with the code.

The Synonyms tab under *Maintenance* | *Thesaurus* can be used to Add, Delete, and change any of the Synonyms used for Resume Processing.

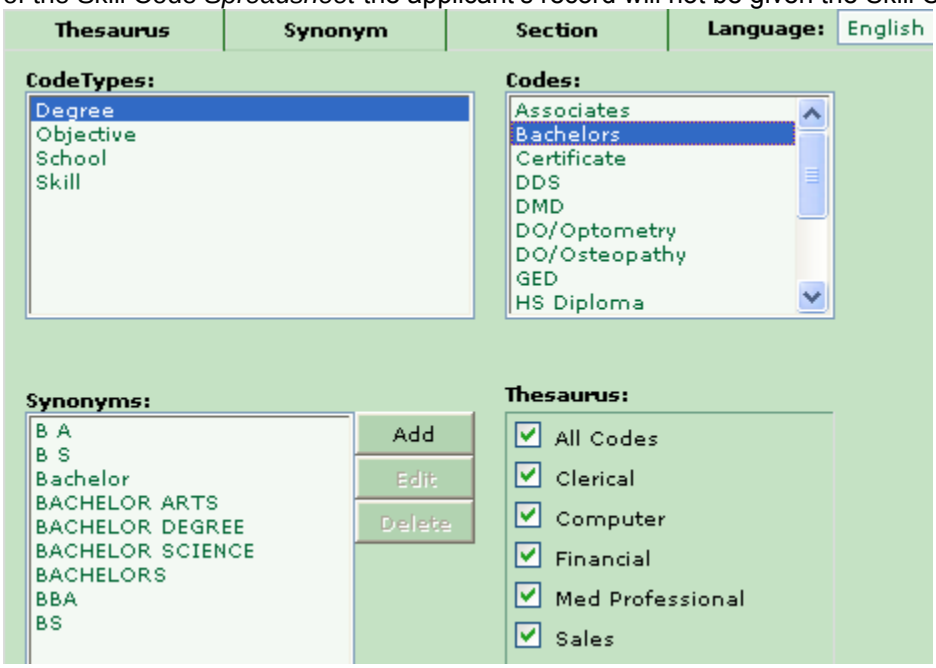
Select the *Synonym* tab from within the *Thesaurus* window.



At least one Synonym must be included for each Code. The Synonyms are what the system actually looks for in resume processing.

Add a new Synonym for the *Administrative Asst* Objective, such as *Executive Assistant*. Then highlight and *Delete* the *Clerk* synonym that is not specific enough to avoid being picked up incorrectly (i.e. Sales Clerk would be found). Then change the existing *Clerical* to *Clerical Assistant* using the *Edit* Button. Make sure the *Admin Asst* Code is included in all appropriate Thesauri by checking the box next to the pertinent Thesaurus names.

The Skills, Degrees and Objective Codes are defined in Codes Maintenance. However, the synonym is what the system searches for when it analyzes a resume. For instance, if the Skill Code is *Spreadsheet* and the Applicant's resume says *Excel,* what happens? That will depend on what Synonyms were identified for the Skill Code *Spreadsheet*. If the Synonyms contain *Excel* and *Spreadsheets* the system will populate the applicant's record with a Skill Code of *Spreadsheet.* However, if *Excel* is not a Synonym of the Skill Code *Spreadsheet* the applicant's record will not be given the Skill Code of *Spreadsheet.*



Example: The Degree Code *Bachelors* would be loaded into the Applicant record if any of the following phrases were found in the Education section of the resume and appropriate Synonyms had been set for this Degree Code:

- BS
- Bachelor Degree Computer Science
- BS Computer Science
- BS Computer
- Bachelors in Computer Science
- Bachelor Degree in Arts

Keep Synonyms Simple

When *iGreentree* is looking in the resume for synonyms, case is ignored. The following noise words are also ignored within phrases: *in, of, the, or, if, when, where, has, is, at, and, will* and *have.* If the noise word is included in the synonym, then the noise word must be part of the text or it will not be found.

***Example*:** If *iGreentree* finds *Bachelor of Science* in the resume text, it will ignore the '*of*', and will assume it means *Bachelor Science*, which is one of the synonyms for *Bachelor.* However, if *BS in Computer Science* were the entry in the synonyms, *BS Computer Science* in a resume would NOT be found unless BS Computer Science is also in the synonyms.

Sometimes a synonym can be kept short and simple, like *Bachelor*, letting the system find it within a phrase, like *Bachelor of Science.* This will help avoid creating more synonyms than are actually needed, and allow the system to analyze resumes faster when it has fewer synonyms to check.

However, sometimes a longer phrase may be needed to clarify the search string.
***Example*:** The simple synonym *AS* may seem at first glance to be a good synonym for *Associates* Degree. But after processing the first few resumes, it will quickly become apparent that it is finding an *Associates* Degree for every Applicant who mentions the word *as* in their Education section. To avoid this, the synonym should be changed to AS Degree, and maybe A.S. Degree.

Case, Spacing, and Punctuation
The system will find the data whether the synonym is in upper or lower case.

The system looks for synonyms as separate words and/or phrases. If a synonym is entered called *database* but the Applicant has *data base* on their resume the skill will not be found. If both words should be detected the synonyms should include both *database* and *data base* as synonyms for the skill code *Database*. Keep this in mind for any word or phrase that is sometimes shown as one word, and other times as two.

Spacing and punctuation DO matter. Punctuation (period, comma, ampersand, etc.) is ignored within phrases in the resume text. This is another item to consider when creating synonyms, especially for Degree codes. For example, one Applicant may list their Bachelor of Science degree as *BS*, and someone else may put *B.S.* Only a single synonym is needed to capture both of these: BS, since the system will ignore punctuation if it is not put into the synonym. Be careful though, as a resume that has *B. S.* would not be found due to the space between the *B.* and the *S.*

However, there may be times when punctuation IS included in the synonym, and the system will only find the code if that punctuation is there. Again using a Degree example, this time for a Masters of Science. If a simple synonym of *MS* is used, it would find MS degrees, but it might also find mentions of *MS-DOS*, the state of Mississippi, and even *Ms.* Within a cover letter, such as *Dear Ms. Recruiter*. This is a good example of an occasion where the synonym SHOULD include the punctuation to avoid these other "MS" things that should not be found.

Another way to avoid getting other MS things is to create synonyms like MS Degree and MSN, longer words and phrases that are more likely to refer to the degree.

Wildcard and Within
The synonyms can be set up to utilize the wildcard. A synonym that contains a wildcard will find any words that begin with an exact match of the characters before the asterisk.

***Example*:** The synonym is *Program*.* A resume that contains Program, Programmer, and/or Programming would be identified and the Applicant's record given the Programming Skill Code that contains the above Synonym.
Synonyms can also be set up to utilize within statements. A within statement tells the system to find a synonym that is within so many words of another word. The within statement can search up to 9 words before or after the word to be found. The format must be as follows: *word w/5 word*. A synonym can use the wildcard function or the w/# function, but not both within the same synonym.

***Example*:** The synonym is *Access w/3 Excel*. This Synonym will find any of the following:

- Computer Skills: Access, Excel, Word, PowerPoint
- Computer Skills: Excel, Word, PowerPoint, Access

However, the system would not find the following:

- Computer Skills: Access, Dbase, PowerPoint, Word, Excel
- Responsible for providing and monitoring customer access to the vault.

Resume Analyzer uses FuzzySearch Technology
iGreentree uses FuzzySearch technology when searching for data in resumes. FuzzySearch looks for both the exact phrases listed as a synonym, and also phrases that are very close, only a letter or two different. This technology is useful when there are OCR errors, because a code that might not have been found when looking for an exact phrase is still found using FuzzySearch despite OCR errors.

The FuzzySearch level in Resume Analyzer can be set by adjusting the Resume Inbox Properties.
***Example*:** The synonym is *recruiter*, but the code is still found on a resume that mentions *recruited*.
***Example*:** A synonym of *Personnel* would still find the code even if OCR erroneously reads the word as *persomel.*
FuzzySearch syntax can be used in Synonyms too:
Example: To find Programming, Programmer, or Programmer/Analyst, use a single Synonym of *programm*.*
Example: To find the word *computer* within 4 words of the word *bachelor*, use a single Synonym of *computer w/4 bachelor.*

The Code as its own Synonym
The code itself often needs to be included as its own synonym. The system default places a code into its own synonym list. However, there may be occasions where the code should NOT be its own synonym for itself, for instance when the code itself might be found incorrectly (see *Beware of Multiple Meanings* below).
Example: In Maintenance, a Degree code called *Bach* might exist. The exact phrase *Bach* is not likely to be on anyone's Resume, so is not needed as a synonym, but *bachelor* would be a good synonym.

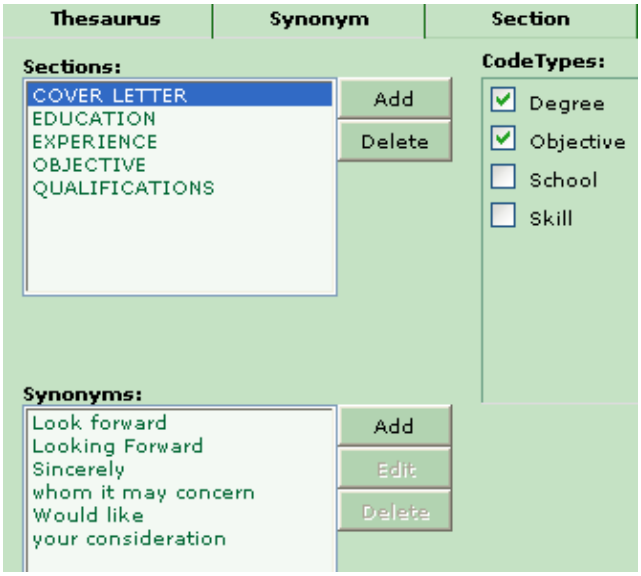
Beware Multiple Meanings
Example: A Skill called *C* (a programming language) with a synonym of *C* is not recommended. This synonym would find every instance of *C* on the resume, such as *Item C* or *Washington, D.C* and give ALL those Applicants a Skill of *C*. Therefore, delete the synonym *C*, and create synonyms such as *C programming, C,* (with a comma) and *C language*.

Partial Words not Found
Example: If *Networking* needs to be found as a Skill, a Synonym of *Network* would not find it, but *Network** would.
Example: Some people write *database* as one word, some write it as two. So include both *database* and *data base* in the Synonyms for this Skill.

Number of Synonyms
iGreentree can hold an unlimited number of synonyms (as long as there is disk space). However, the more synonyms it has to search for, the longer the Analyze process will take. So for efficient processing, only include the common words and phrases that are typically used in resumes.

Sections
Sections tell iGreentree where to look in the resume for each type of data.
Example: Suppose an Applicant has a skill of *Applicant Tracking.* If Experience has not been identified as a section of the resume, the system will search the entire resume for the phrase *Applicant Tracking*. However, if iGreentree has been set up to look in the Experience section for Skills, it will process more quickly since it has a smaller amount of text to search. Synonyms are also set up for each Section since people identify the sections of their resumes using different phrases.

Select the *Section* tab from within the *Thesaurus* window.



Once sections are set to find the data that is needed from the resumes received, the need to revisit this set up should be rare. Section Maintenance should be reviewed in all new systems. A few adjustments might make a difference in how the system will analyze future resumes.

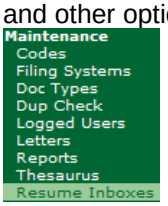
Education and Experience are usually the most important sections to set for processing resumes. So highlight the Education section, and check which Code Types are being found for this section. Adjust the Code Types as needed. Also *Add, Edit,* and *Delete* synonyms for this Section as needed.

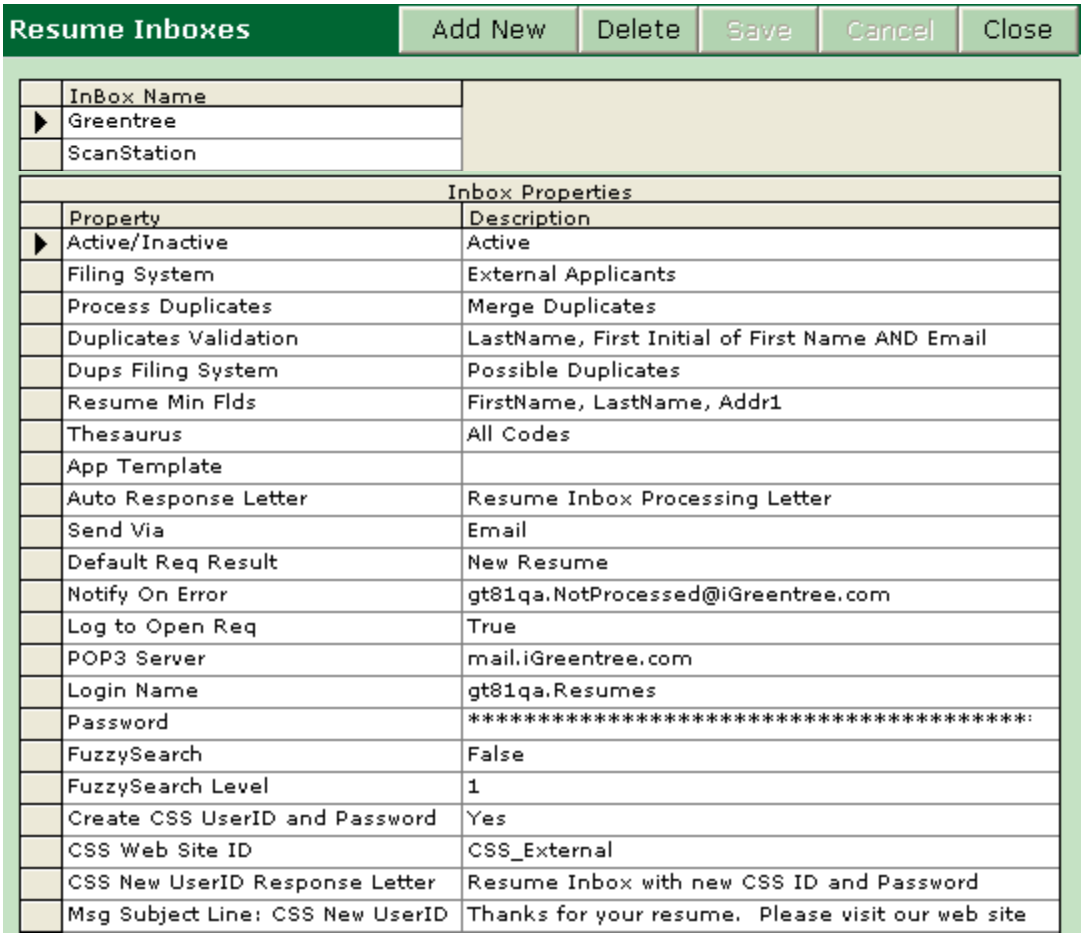
Resume Processing and ScanStation Modules

Resume Inboxes

This is used to set options for how the iGreentree system will process resumes that come directly from email via *Automatic Resume Processing (ARP).*

ARP currently only works with Internet email. If another type such as MAPI is used, contact Greentree for possible workarounds. In the meantime, review the Resume Processing chapters for other options to get emailed resumes into the system. Also, see the Applicant Entry chapter for more information about ARP and other options for processing resumes.





The above image displays all properties that can be set for each *Resume Inbox*:

- Inbox Name: The name of the inbox that will collect a particular type of resumes. There can be several different inboxes if different types of resumes will need different properties defined as explained below.
- Active\Inactive: Signals to ARP if this inbox should be checked for resumes. If set to *Active*, ARP will collect resumes from the identified inbox. Otherwise ARP will not collect resumes from the identified inbox.
- Filing System: Identifies the *Filing System* in which applicants will be placed if a possible duplicate record does not currently exist.
- Process Duplicates: Identifies how a possible duplicate Applicant record is to be handled: Ignore, Merge, or put into an alternate Filing System.
- Duplicates Validation: Identifies the grouping of Applicant fields that are to be used as criteria in determining a duplicate Applicant record. Options that include *Last Name, First Name, And First Initial* require an exact name match; this does not use Soundex. Options that include *Addr1* require an exact string match on the first line of the address, and options including *Email* and/or *SSN* require an exact match.
- Dups Filing System: Identifies the Filing System in which the Applicant record will be placed, if it is determined to be a possible duplicate and *Process Duplicates* is set to "Use Alternate Filing System". Greentree recommends that someone regularly go through the process of merging actual duplicates and moving new applicants to a standard Filing System. If a separate Filing System is used for duplicates that come from CSS, the same Filing System can be used for the ARP duplicates.
- Resume Min Flds: Identifies the minimum field information the processor must be able to identify from a submitted resume in order to create a valid Applicant record.

- Thesaurus: Identifies the *Thesaurus* to be used by the resume analyzer for all resumes submitted to this inbox. This property may need to be taken into consideration when deciding if multiple inboxes are necessary.
- App Template: An Applicant Template can be created and set as an inbox property to automatically enter Applicant data that will be the same for all applicants submitting a resume to this inbox. For example, a template that has a particular Source identified, and a particular Recruiter assigned. This option can be turned on or off as needed. Also, this property may need to be taken into consideration when deciding if multiple inboxes are necessary.
- Auto Response Letter: Identifies the letter to be sent automatically (via email) to an Applicant once a resume has been processed by iGreentree. This letter can be inbox specific and is defined by the letter selection under *Letters* in *Maintenance.*
- Send Via: Identifies how the *Auto Response Letter* will be sent back to the Applicant after they submit a resume. Currently, the only option is *Email.* If *Email* is not selected, no response letter will be sent.
- Default Req Result: This will be the result value an Applicant will be given if Resume Analyzer finds a reference to a specific requisition. This result is applied only to the Requisition identified in the current email. If your organization utilizes the "Set Other App/Req Results To" in the Hire/Fill Action the result will not be updated for records that were populated by this default.
- Notify On Error: This property works in conjunction with the *Resume Min Flds* property. If the analyzer cannot find the identified minimum Applicant information, the email will be rejected and sent to this inbox. This erred resume inbox should be an inbox that an HR representative can easily monitor. It can be their inbox address. This representative will be the one to correct and resubmit erred resumes. For information regarding *Handling Erred Resumes*, refer to chapter 6.
- Log To Open Req: If Resume Analyzer finds a reference to an open Requisition within the email being processed, the Applicant will automatically be logged to the Requisition if this property is set to *True.* If it is set to *False*, Resume Analyzer will not look for open requisitions to log applicants to.
- POP3 Server: Identifies the email POP3 server name or IP address (e.g. mail.greentreesystems.com). Usually the IT Department determines what to enter here, as well as the next two properties.
- Login Name: Identifies the email inbox login name. For example, careers@iGreentree.com, 'careers' is the *Login Name*
- Password: The email inbox password. This allows the processor to log into and retrieve all resumes sitting in the inbox.
- Fuzzy Search: Determines whether or not the Resume Analyzer will use Fuzzy Search.
- Fuzzy Search Level: Sets the level of Fuzzy Search (higher number = fuzzier) the processor is to use. In other words, how closely an identified resume text string must match an identified text string in the thesaurus before the thesaurus value is assigned to the Applicant record.
  Lowest (0) is best used for text files
  Low (1) works well for emailed resumes
  High (2) is utilized for OCR'd resumes
  Highest (3) is typically reserved for faxes
- Create CSS UserID and Password: Determines if new applicants entered into the system via this Resume Inbox should have a UserID and Password automatically generated.
- CSS Website ID: Determines which CSS Site the applicants will be associated with (Most likely Internal or External)
- CSS New UserID Response Letter: Determines which letter (if any) will be e-mailed to applicants who are entered via this Resume Inbox.
- Msg Subject Line: CSS New UserID: Determine the subject line to be used in the e-mail mentioned above.

Appendix

Glossary of Terms

Action
Function used to update data and/or generate output such as letters or reports. There is an Action available for each event that commonly occurs in the employment process.

Adverse Impact
Reporting required for companies of a certain size that have government contracts, to determine whether selection of Applicants has adversely impacted minorities or females.

Applicant (App)
A person who applies for a specific position. The iGreentree system can be used to track any Applicant, whether they apply by turning in a hard copy Application Form, sending a resume via mail, fax, or email, or apply electronically through Candidate Self-Service. Applicants who come from any of the above are all tracked in the same Applicant screen (the Applicant Base Record), although some may have different Attachments depending on where the data came from.

Applicant Tracking
A system to help employment departments keep track of Applications, resumes, and job openings, including EEO statistics, job postings, Applicant letters, name and skill searching, interview tracking, and resume scanning.

Application (Appn)
The complete set of documents and forms that an Applicant submits to apply for one specific job opening.

AppReq
The association of applicants to the requisitions that for which they are being considered. Commonly thought of as Applications, although an applicant may be considered for a requisition without specifically applying (this process is referred to as “logging the applicant to the requisition”).

Approver
A person responsible for reviewing and approving a Requisition request. They must be in the system as a Hiring Manager, with a user name and password that allows them to log into the Hiring Manager module.

Archived Applicant
Applicants may be marked as archived which removes the applicant from search results and all other applicant related activity while retaining their information in the system, including the jobs to which they have applied. Archived applicants may be easily restored or permanently purged from the system.

Attachment
Additional information attached to a base record.

Automatic Resume Processing (ARP)
The process of automatically bringing resumes from email directly into the iGreentree database..

Base Record
The window where primary information about an Applicant, Requisition, Source/Expense, or Hiring Manager is stored. The base record for an Applicant or Hiring Manager usually includes the person's name and address. The base record for a Requisition usually includes the job title and date the job was opened.

Call Log
A record of communication about a Requisition or communication with an Applicant..

Candidate Self-Service (CSS)
Candidate Self-Service is a web-based module for use by Applicants to review currently open positions, create a profile, apply online, view Application statuses, and set up Job Alerts. Access may be from a "kiosk" in the HR lobby, or from the Applicant's own computer via internet. Abbreviated as *CSS*.

Codes
Data items that are validated to keep data consistent and easy to search.

Cover Letter
A letter which typically accompanies a resume, introducing the Applicant and highlighting the Applicants' qualifications for a particular position. Often mentions where the Applicant heard about the job opening. May be scanned into the database as part of a resume, or as a separate document.

CSSForm
The Application that is created in iGreentree when using the CSS Module. The CSSForm will vary in content depending on the organization.

CSS Profile
Application information is stored as profile information. The Applicant may update/add to their profile information for future Applications.

CSS Questions
Questions (yes/no, multiple choice, single entry and essay) that can be asked of an Applicant when applying for a specific Requisition. CSS Questions can be used to disqualify Applicants based on the answer given.

CSS Skills
Skills that are presented to the Applicant when applying via the CSS Module. These skills are Requisition specific.

Customization
Changes made to the database that are above and beyond the usual system Tailoring that is included with initial purchase.

Dashboard
The iGreentree Information Center (commonly referred to as the Dashboard) contains an activity bar graph display (with links to perform the search to allow viewing of the details) and Announcements for communication to other iGreentree users. The Dashboard is displayed to the right of the menu whenever any activity is closed.

Database
A collection of information organized especially for rapid search and retrieval.

Default
The standard choice. If something else is not selected, the default choice will be used.

Document
Special Attachment to a Requisition, Applicant, Source, or Hiring Manager. Documents such as References, Applications, Publications, Drug Screening Results, and Testing Forms can be attached to an Applicant Record. Documents such as Job Descriptions and Requisition Forms can be attached to Requisition Records.

EEO
Equal Employment Opportunity

Expense
The costs associated with a Requisition.

Export
To take data from your iGreentree system for use in some other Application, such as a spreadsheet, word processing program, or an employee database (HRIS). Usually performed by running a report.

Expression of Interest (EOI)
Allowing Expression of Interest on a job opening (Requisition) enables a CSS Applicant to submit their basic personal information and resume online instead of submitting a full CSS Application.

Field
A place to store a single piece of information.

Filing System
A grouping of Applicants or Requisitions that are assigned ID numbers in the same format and range of numbers. There are typically several filing systems within each database.

Greentree Administrator
The person within your Employment Department who is responsible for keeping your Greentree Employment System running smoothly. This person performs routine maintenance, as well as answering questions for Users and serving as the main contact to Greentree.

Hiring Manager (Mgr)
The individual responsible for filing the open Requisition, usually the manager of the department or floor.

Hiring Manager Module
Module that allows Hiring Managers to enter and record their own Requisition activity including offers, hires, etc.

History
History of actions that have been taken for an Applicant, Requisition, Source, or Hiring Manager. Information is entered via the Actions and is tracked in the History. Some additional information, such as Results, may be entered in the History.

Hosted Services
Services provided by Greentree when your database is stored at a Greentree location. Includes many system administration functions, and may include services such as resume scanning, resume loading, document scanning, sending acknowledgment letters, and more. Contact Greentree to discuss how these services could benefit your organization.

Image
A graphic file that is an exact picture of the resume. Differs from the Resume Text file, which has been through OCR, and contains simple alphanumeric text.

Import
To bring data into your iGreentree system from some other database or other Applications such as a spreadsheet or word processing program.

Job Postings
A list of the current positions that are open within the company. May include titles, departments, job descriptions, contact names, and other information about the open jobs. Posting a Req to a Source means that source has been informed of that opening, perhaps the Job Posting report was sent to them.

Letter
Communication to an Applicant. May be sent via email or printed hardcopy.

Log To Req
To connect an Applicant to a Requisition, now considered a candidate for that position. Creates a record in the both Applicant History of Reqs, and Reqs Applied For History of Applicants. May occur from almost any Applicant action.

Lookup Table
Some coded fields may have Lookup Tables behind them, allowing the User to enter information that relates to the code only once instead of entering it again on every Applicant or Requisition record. An example is Department, where the User selects a short code or name on the Applicant or Requisition screen, yet additional information about the department, such as the full name and department head, is stored in a Lookup Table, available for use in letters and report.

Main Menu
The menu located on the left side of the iGreentree window. This menu is always visible to the Users who can make selections from it at any time.

Multiple Openings per Requisition (MOPR)
Multiple Openings per Requisition option. Used by organizations who frequently get one Req form for a large number of *identical* openings (20+). *Total Openings* and *Total Filled* fields are used on master Req, and a subreq is automatically created when each opening is filled. The system updates *Total Filled* automatically.

Notes
A free-text document within the iGreentree system that allows Users to keep additional information that does not fit into pre-defined data fields. Typically replaces writing on the back of a resume or Requisition or using yellow sticky notes.

Optical Character Recognition (OCR)
Commonly abbreviated as OCR. A method of converting information such as a resume image that has been scanned into a text form that can be read by the computer.

Purge
To remove records permanently from the database. Purging large groups of old records may improve performance of the iGreentree system and simplify searching.

QuickSearch
Function to find the data within iGreentree. Available for Applicants, Requisitions, Sources, Hiring Managers, and Templates.

ReadyReports
Reports that include search criteria as part of the report definition. Easy to run, but less flexible than Search-Dependent reports. Best for reports that are run the same way on a regular basis, such as weekly Postings.

Record
A group of related information about one single item, such as one Applicant or one Requisition.

Recruitment Department (HR)
The people responsible for managing the employment and staffing function within an organization.

Recruiter/HR User
Individuals with access to the iGreentree system, typically the individuals responsible for recruitment of open positions.

Related Questions
Section of the CSSForm that is used to collect miscellaneous information not captured in specific sections of the CSSForm.

Requisition
A job opening. The iGreentree system can help track all aspects of the job opening, including printing job postings, Requisition status reports, EEO statistics, tracking expenses, and matching candidates to openings.

Report Librarian
Person who creates and/or changes Greentree reports. All Users can run reports, but the Report Librarian has Crystal Reports and special security rights and training for Report Writing.

Result vs Status
Status refers to how the Applicant rates overall in your organization. Whereas a result is how the Applicant rates for the specific position they applied for. An Applicant could have many results but only one status.

Resume Processing (Res Proc)
A module of iGreentree that allows resumes to be processed and loaded, regardless of whether the resumes are scanned with ScanStation, scanned by an outsource outside scanning service, and/or whether the resumes are sent by the Applicant via electronic mail. The processor populates base information for Applicants such as name and address, and certain Attachments such as Skills and Education Summary. It also allows Users to maintain resumes on-line and route as needed.

Routing
Sending resumes, Applications, or other Applicant data to hiring managers and others involved in the hiring decision for their consideration.

Scanning
A method of sending information into the computer by sliding a paper through a scanner machine and allowing the computer to read the information and convert it into a computer file. Usually used to scan resumes, but may be used to scan other documents as well.

ScanStation
A program that is used to scan resumes and other documents. Must be installed on the computer where the scanner is connected. The program allows Users to scan resumes from any location and end the files via email to the iGreentree database.

Search Committee
A group of one or more people who are in the system as Hiring Managers and are tasked with reviewing Applicants for a specific Requisition, that is, they review Applications. They may have read-only or update access to the Application record depending on the security setting.

Search-Dependent Reports
Reports that are run after performing a search. Allows the User to choose which records to include in the report. These reports may be more difficult to find and run than ReadyReports, but they allow greater flexibility to the User in deciding which data to include. Search-dependent reports can be run from List View or Form View.

Send Anonymously
An email option for letters and notifications that allows the organization to send out emails where the *From* address is a general company email address rather than a specific person's email address.

Source
Where an Applicant finds out about a job. Common Sources are job fairs, web sites such as the company's web site, CareerBuilder.com and Monster.com, or employee referrals.

Synonym
Another word for the same thing. Items in iGreentree that may need Synonyms include Codes for Resume Processing, and Sections of a resume. Synonyms are important because not all Applicants will use the same wording on their resumes, yet searching is easier if a common Code is used.

Tailoring
Changes to standard database to make it meet your organizational needs. Includes adding/deleting/re-labeling fields from the Applicant and Requisition screens (with some limitations.) Tailoring can be bought along with the initial purchase of your system. Some organizations choose to have tailoring done later which is completed per a Greentree Systems proposed and customer approved bid. Changes beyond normal Tailoring are called Customization, and require a bid. Contact Greentree Technical Support for additional information about Tailoring.

Template
Applicant or Requisition data used to create records with one or more fields in common. Used in initial data entry to copy records or enter records with common fields. Also used for Apply Template action, to change data in one or more fields on multiple records. For the Hiring Manager module, there is a link in the Job Code lookup table to specify the Requisition Template (including Job Description, Job Qualifications, CSS Questions, and CSS Skills) to expedite creation of a new Requisition when the Job Code is selected.

Thesaurus
A grouping of codes that is used for loading resumes. It includes Degrees, Skills, and Objectives that are appropriate for a particular kind of Applicant, and can speed up the Analyze process by limiting which codes are found and entered for that Applicant.

Actions Quick Reference

Applicant Actions

Action Name	Edit/ List	History	Output	Comments
Log to Source	Edit, List	App Sources, Source Applicants, Source Hires		To track where Applicant came from
Send Letter/ Mass Mailing	Edit, List	App Letters	Email or Hardcopy letter	Letters also available from Reject, Interview, Offer, Hire and Fill
Log to Req	Edit, List	Applicant - Reqs Applied For, Requisition - Applicants		Can also happen from Log to Source, Reject, Route, Interview, Test Results, Offer, and Hire actions
Reject	Edit, List		Letter optional	Either update App Status, or AppReq Result, can Log to Req
Route	Edit, List	App Routes, Hiring Mgr Routes	Email or hardcopy Attachments	For Requisition optional, also updates App Status, can track results, can Log to Req
Interview	Edit	App Interviews, Hiring Mgr Interviews	Letter optional	Can track results, can Log to Req
Test Results	Edit	App Tests		Can track other things that have results, such as background checks, certifications, salary requirements
Make Offer	Edit	App Offers, Req Offers. Hiring Mgr Offers	Letter optional	Info can default into Hire or Fill actions. Updates App Status, Req Status, AppReq Result, can Log to Req
Hire	Edit	Source Hires, Hiring Mgr Hires	Letter optional	Info can default from last offer, Updates App Status, Req Status, AppReq Result, AppReq Results for other candidates, can Log to Req
Dup Check	Edit	Combines History from 2 App records		To combine 2 records that are really the same person
Applicant Reports	Edit, List		Printed report or File in other program	Includes records found in search, can output to Crystal Reports or other program such as Word
Request OIG Background Check	Edit, List			Connects to the OIG Database for employment status verification. Updates 2 fields on App record
Call Log	Edit	Call History		Allows you to track communication activity with notes regarding an Applicant.
Change Password	Edit			Allows the User to change an Applicant's CSS Password
Request Background Check	Edit	Background Investigations	Email to Applicant with link for Background Vendor's Site	Connects to a background check vendor to request specific investigations.
Apply Template	List			Updates group of records with same data

Action Name	Edit/ List	History	Output	Comments
Change Filing System	List			Changes both Filing System field and ID number
Archive	List			Can restore archived applicants under Maintenance/Archived Applicants.
Purge	List	All deleted	Should run report first	Be careful, permanently removes data; good for cleaning out
Create CSS UserID and PWD	List			Will not overwrite existing UserID and Password for Applicants

Application Actions

Action Name	Edit/ List	History	Output	Comments
Send Letter/Mass Mailing	Edit, List	Letters	Email or Hardcopy letter	Letters also available under Applicant Actions-Send Letter and Mass Mailing
Reject	Edit		Letter optional	Updates Application Result and App Status, can send optional letter
Route	Edit, List	Routes	Email Attachments	For a Req, sets App Status, sets Application Result, sends selected attachments
Interview	Edit	Interviews	Email or Letter optional	Sets Application Status, sets Application Result, can place on calendar
Test Results	Edit	Tests, App Tests		Can track other things that have results such as background checks, certifications, salary requirements
Make Offer	Edit	Offers, App Offers, Req Offers, Hiring Mgr Hires	Letter optional	Info can default into Hire or Fill actions. Updates App Status, Req Status, Application Result, can Log to Req
Hire	Edit	Source Hires, Hiring Mgr Hires	Letter optional	Info can default from last offer, Updates App Status, Req Status, Application Result, Application Results for other candidates.
Application Reports	Edit, List		Printed report or File in other program	Includes records found in search, can output to Crystal Reports or other program such as Word
Call Log	Edit	Applicant - Call History		Allows you to track communication activity with notes regarding an Applicant.

Requisition Actions

Action Name	Edit/ List	History	Output	Comments
Find Matching Apps	Edit		New browser window with list of Apps	To find possible candidates, can also run from Search Criteria Attachment, ranks results by how close matched Search Criteria
Post to Source	Edit, List	Req Postings, Source Postings	Report optional	To track where the job has been posted
Enter Expense/ Distribute Expense	Edit, List	Req Expenses, Source Expenses		Can only choose from Expense list if Source has Track Exp option on
Place On Hold	Edit, List	Req Holds		Use to track time on hold and perhaps to remove job from postings
Take Off Hold	Edit, List	Req Holds		Dates can be subtracted in Time to Fill reports
Withdraw	Edit, List			Updates Req Status and AppReq Results
Fill	Edit	Source Hires, Hiring Mgr Hires	Letter optional	Info can default from last offer, Updates App Status, Req Status, AppReq Result, AppReq Results for other candidates, same as Hire App
Copy to Template	Edit		New Template	To create new Template similar to existing Req, with Attachments
Requisition Reports	Edit, List		Printed report or File in other program	Includes records found in search, can output to Crystal Reports or other program such as Word
Add Approvers	Edit	Req Approvers	Email Notification	The recruiter can add additional approvers to an existing Req that is in the approval process.
Re-Open	Edit			Reverses a Fill or Hire Action
Call Log	Edit	Call Log History		Allows the User to record any communication information in reference to this particular Requisition
Apply Template	List			Updates group of records with same data
Change Filing System	List			Changes both Filing System field and Req number
Purge	List	All deleted	Should run report first	Be careful, permanently removes data, good for cleaning out old info

Sources/Expenses Actions

Action Name	Edit/ List	History	Output	Comments
Send Letter	Edit	Source Letters	Email or Hardcopy letter	Mass Mailing available to send the same form letter to a group of people
Enter Expense/ Distribute Expense	Edit, List	Req Expenses, Source Expenses		Same as Expense action in Req
Log Applicant	Edit, List	Applicants		Allows you to Log an Applicant
Source Reports	Edit, List		Printed report or File in other program	Includes records found in search, can output to Crystal Reports or other program such as Word
Purge	List	All deleted	Should run report first	Be careful, permanently removes data, good for cleaning out

Hiring Manager Actions

Action Name	Edit/ List	History	Output	Comments
Send Letter/ Mass Mailing	Edit, List	Hiring Mgr Letters	Email or Hardcopy letter	Mass Mailing available to send the same form letter to a group of people
Hiring Mgr Reports	Edit, List		Printed report or File in other program	Includes records found in search, can output to Crystal Reports or other program such as Word
Change Password	Edit			Allows the User to change the password used with the Hiring Manager Module.
Archive	List			Can be reversed under Maintenance/Archived Hiring Mgr
Purge	List	All deleted	Should run report first	Be careful, permanently removes data, good for cleaning out old info

Requisition/Applicant Template Actions

Action Name	Edit/ List	History	Output	Comments
Copy to New	Edit	Copies History to new Template	New Template	To create new Template similar to one that already exists
Purge	List		Should run report first	Be careful, permanently removes Template

NOTE: All Actions available in Edit View are also available in Summary View

History Quick Reference

Applicant History

History Name	Action it comes from	Comments
Reqs Applied For	Log to Req	Can also come from Log to Source, Reject, Route, Interview, Test Results, Offer, and Hire actions, can track results
Routes	Route	Can track results
Interviews	Interview	Can track results
Offers	Make Offer	Tracks $, dates, answers, and comments about each offer
Tests	Test Results	Tracks tests and other items that have results, such as reference checks and salary requirements
Letters	Send Letter, Mass Mailing, Route, Interview, Make Offer, Hire, Fill (Req)	No need to print hardcopy since the letter text is stored. Also includes automated letters sent to Applicant when applying via CSS.
Sources	Log to Source	Tracks which source(s) Applicants came from
CSS Questions Answers	Applicant applying via CSS Site	Cannot be modified
Call Log	Call Log	Can track communication information on a specific Applicant, can be Req specific if entered.
Background Investigations	Request Background Check	Tracks Background Checks requested and their associated status.

Application History

History Name	Action it comes from	Comments
Routes	Route	Can track results
Interviews	Interview	Can track results
Offers	Make Offer	Tracks $, dates, answers, and comments about each offer
Tests	Test Results	Tracks tests and other items that have results, such as reference checks and salary requirements
Letters	Send Letter, Mass Mailing, Route, Interview, Make Offer, Hire, Fill (Req)	No need to print hardcopy since the letter text is stored. Also includes automated letters sent to Applicant when applying via CSS.
Sources	Log to Source	Tracks which source(s) Applicants came from
Call Log	Call Log	Can track communication information on a specific Applicant, can be Req specific if entered.
Background Investigations	Request Background Check	Tracks Background Checks requested and their associated status.

Requisition History

History Name	Action it comes from	Comments
Applicants	Log to Req (App)	Can also come from App Actions: Log to Source, Reject, Route, Interview, Test Results, Offer, and Hire, can track results
Postings	Post to Source	Tracks where the job was posted
Holds	Place On Hold, Take Off Hold	Tracks time on hold, may be subtracted in time-to-fill

Offers	Make Offer (App)	History of multiple offers
Expenses	Enter Expense (Req), Distribute Expense, Enter Expense (Source)	Track how much is being spent on recruiting, can report on cost-per-hire
Approvers Audit	Add Approvers (Req History), Approvers (Req Attachment) Automated Req Approval (Hiring Mgr)	Tracks information about who has reviewed/not reviewed a Requisition that was submitted into the Hiring Manager Module's Automated Approval Process. Also records any changes that have been made to the Requisition as it moves through that process.
CSS Questions Audit	Adding CSS Questions	Tracks what questions and answers have been added/modified on the Requisition
Call Log	Call Log	Can track communications on Applicants attached to a specific Requisition.

Sources/Expenses History

History Name	Action it comes from	Comments
Postings	Post to Source (Req)	History of which jobs were posted to each source
Applicants	Log to Source (App)	History of which Applicants came from each source
Hires	Hire (App)	If App was posted to this source, when App is Hired this History appears
Letters	Send Letter (Source)	History of letters sent to each source
Expenses	Enter Expense (Req), Distribute Expense, Enter Expense	Track how much is being spent on recruiting, can report on cost-per-hire

Hiring Manager History

History Name	Action it comes from	Comments
Routes	Route (App)	When that Mgr is picked in Route action
Reqs	Log to Req (App)	When Req has that Mgr designated
Interviews	Interview (App)	When Req with that Mgr is chosen from Intvw action
Offers	Make Offer (App)	When Req with that Mgr is chosen from Offer action
Hires	Hire (App)	When Req with that Mgr is chosen from Hire action
Letters	Send Letter (Hiring Mgr)	History of letters sent to each Hiring Manager

Attachments Quick Reference

Applicant Attachments

Attachment Name	Where data comes from	Why you need it	Comments
Notes	Manual data entry or Copy and paste from email	Track misc. info. such as discussions	Replaces scribbles on the back of resumes and Applications and yellow sticky notes
Experience Summary	CSS, load resume, or manual data entry	Determine if qualified	Can be used in Search Criteria as Text Search
Education Summary	CSS, load resume, or manual data entry	Determine if qualified	Can search on Degree from Applicant QuickSearch, or include degree in Search Criteria
Licenses & Certificates	CSS or manual data entry	Determine if qualified	Can be used in Search Criteria as Text Search
Resume Text	Load emailed resume or scanned and OCR'd resume	Best version of resume to route if resume came from email	Good quality if resume came from email, poor quality if scanned and OCR'd, but needed to find name, address, and codes to populate data screens
Resume Image	Load scanned resume	Best version to route if scanned resume	Exact copy of original resume
CSSForm	CSS Site	Application to review	Most recent CSSForm is displayed
Skills	CSS, load resume, or manual data entry	Determine if qualified	Ratings
Objectives	Objective on resume, or manual data entry	General category, NOT specific opening	Do not confuse with Log to Req, which connects App to job applying for. Used to track area of interest.
Contact Info	Manual data entry	Track extra phone numbers and email addresses	Beeper, pager, cell phone, fax, secondary email addresses, temporary info when at school, etc.
EEO	CSS or Manual data entry	EEOC reporting	May wish to block this info from some Users
Document List	Attach files from email, scanning, etc.	Paperless office, routing	Interview notes, Application forms, advertisements, etc.
CSS Properties	CSS registration Form	To reset just in case	Cannot view password, only resent if necessary

Application Attachments

Attachment Name	Where data comes from	Why you need it	Comments
Application Notes	Manual data entry or Copy and paste from email	Track misc. info. such as discussions	Replaces scribbles on the back of resumes and Applications and yellow sticky notes
Experience Summary	CSS, load resume, or manual data entry	Determine if qualified	Can be used in Search Criteria as Text Search
Education Summary	CSS, load resume, or manual data entry	Determine if qualified	Can search on Degree from Applicant QuickSearch, or include degree in Search Criteria
Licenses & Certificates	CSS or manual data entry	Determine if qualified	Can be used in Search Criteria as Text Search
Resume Text	Load emailed resume or scanned and OCR'd resume	Best version of resume to route if resume came from email	Good quality if resume came from email, poor quality if scanned and OCR'd, but needed to find name, address, and codes to populate data screens
CSSForm	CSS Site	Application to review	Most recent CSSForm for this req is displayed
Document List	Attach files from email, scanning, etc.	Paperless office, routing	Interview notes, Application forms, advertisements, etc.

Requisition Attachments

Attachment Name	Where data comes from	Why you need it	Comments
Notes	Manual data entry or Copy and paste from email	Track misc. info. such as discussions with Hiring Mgr, budget info, etc.	Replaces scribbles on the back of Req forms and yellow sticky notes
Job Description	Req Template, Copy and Paste from Word or Manually enter	Generate Postings and Search Criteria	Usually outlines the job's Responsibilities
Job Qualifications	Req Template, Copy and Paste from Word, or Manually typed.	Generate Postings and Search Criteria	Usually specifies the job's Requirements
Search Criteria	Analyze Job Description, add/change criteria as needed	Find Matching Apps (qualified candidates)	Can come from Analyzing Job Desc, but may also set criteria however needed
CSS Additional Links	Manual entry by HR	Places link on CSS Site	Allows Applicants to follow link for more information on job, benefits, etc
CSS Questions	Hiring Manager or manual data entry	Screens Applicants	Allows you to auto reject Applicants or obtain a ranking if desired
CSS Skills	Manual data entry or Req Template	Display appropriate skills in CSS screen	E.g.: Want certain skills to show in CSS for clerical Applicants, different skills for MIS
CSS Uploadable Documents	Uploaded by Applicants via CSS	So Applicants can provide docs	Allows Applicants to submit required documents
Document List	Attach files from email, scanning, etc.	Paperless office, routing	Interview notes, Application forms, advertisements, etc.
Approvers	Hiring Manager or Add Approver (Req)	Keeps track of who approved req.	Allows the recruiter to review the approval status of each approver. It will also allow approvers to be added or removed.
Search Committee	Hiring Manager or manual data entry	Lets others view Applicants	In case more than one individual needs to review/approve Applicants

Sources/Expenses Attachments

Attachment Name	Where data comes from	Why you need it	Comments
Notes	Manual data entry or Copy and paste from email	Track misc. info. such as discussions, etc.	Replaces yellow sticky notes and extra hardcopy files
Objectives	Manual data entry	General category, NOT specific opening	Only used to track general types of jobs that are good from that Source
Contact Info	Manual data entry	Track extra phone numbers, etc	Beeper, pager, cell phone, fax, secondary email addresses, temporary contact, etc.
Document List	Attach files from email, scanning, etc.	Paperless office	Contracts, invoices, advertisements, brochures, etc.

Hiring Manager Attachments

Attachment Name	Where data comes from	Why you need it	Comments
Notes	Manual data entry or Copy and paste from email	Track misc. info. such as vacations	Replaces yellow sticky notes and extra hardcopy files
Contact Info	Manual data entry	Track extra phone numbers, etc	Beeper, pager, cell phone, fax, secondary email addresses, temporary contact, etc.
Document List	Attach files from email, scanning, etc.	Paperless office	Copies of everything manager ever sent to HR

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